# Maximizer™ 9

Succeed by Managing More Contacts and Closing More Sales!

**Maximize** your time

**Create** satisfied customers

**Increase** your sales

# User's Guide

Maximizer™
The CRM Company

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## Printing Information

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## Applicability

This document applies to Maximizer 9 software.

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CHAPTER 1

# Welcome to Maximizer

*Introducing Maximizer*

## In this chapter...

# Grow Your Business with Maximizer

Maximizer is a contact manager designed to help individuals, home offices, and small businesses succeed by helping them maximize their time, create satisfied customers, and increase sales.

With Maximizer, users can easily manage and profile customers and prospects, track every sale from lead to close and maintain long-lasting relationships well after the initial sale has been made. Maximizer is a solution that incorporates contact management with sales opportunity management, scheduling, communication, Outlook integration, Palm® synchronization, Crystal Reports®, Accounting Link designed for use with QuickBooks®, a company library, and e-commerce.

## Key Benefits of Maximizer

- Manage customers better than your competitors by recording details of every relationship
- Effectively track prospects to close more sales
- Schedule your time and others
- Manage an unlimited number of contacts
- Integrate with Microsoft Outlook's email and calendar
- Manage your business and free up valuable time with automatic reporting and analysis
- Send personal letters and announcements linked to your contact's record with mail-merged letters, faxes, and emails

# Day-to-day Contact Management with Maximizer

## Contact Management

- Manage an unlimited number of contacts
- Record and view a complete history of all customer interactions, including faxes, emails, and calls
- Tailor to your own needs by creating unlimited user-defined fields
- Ensure accurate customer information through mandatory user-defined fields and duplicate record checking
- Create and save your own custom views and layouts
- Save and retrieve favorite lists of Address Book entries

## Opportunity Management

- Manage a pipeline of opportunities from lead to close
- Easily forecast revenue and cash flow using one of the many standard reports

## Calendars and Scheduling

- Quickly schedule appointments, activities, and tasks related to contacts
- View and print graphical calendars
- Integrate with the Microsoft Outlook calendar
- Schedule pop-up alarms and create prioritized task lists for yourself and others
- Use the Peg Board to check other users' whereabouts

## Word Processing, Fax, and Email

- Create letters, faxes, memos, emails, stored under each contact for easy reference
- Mail-merge contact information using built-in or custom templates for letters, faxes, and email
- Create documents using the built-in Maximizer Word Processor, or use Microsoft Word or Corel WordPerfect
- Fax your customers
- Send email messages instantly using a VIM- or MAPI-compliant email client

## Marketing

- Share documents, collateral, marketing projects in the central Company library
- Profile customers using your unique user-defined fields to identify trends and similarities
- Monitor market information to achieve and maintain a competitive advantage
- Create targeted and personalized announcements by letter, fax, or email, linked to your contacts' records

## eCommerce Integration

- Use a wizard-driven tool to help you build your website every step of the way—no programming, technical expertise, or design skills required
- Build a web store that supports real-time credit card transaction processing
- Capture customer information with your own web forms using the Web Inquiry Form wizard
- Provide your customers with peace of mind by automatically encrypting all credit card transactions with SSL transaction security
- Generate website traffic with automatic search engine registration

## Reporting and Analysis

- Use advanced reporting to view consolidated activity and history information for each account
- Create, view, and print pre-formatted and custom reports, including revenue forecasts, sales pipeline analysis, account activity, customer profiles, and more
- Enhance your reports with charts, numerical calculations, and full-color graphics

## Database and Administration

- Add new users to an Address Book
- Add new user-defined fields at any time
- Generate weekly activity reports for a particular group or contact
- Coordinate group activities and information with security groups
- Import data from other programs, including ACT!, GoldMine, and Outlook
- Import data from a wide variety of databases, including ASCII, dBase, Access, and XML
- Back up and restore Address Books

# Administrator

In addition to Maximizer, Administrator is a separate component used for managing administrative tasks. Typically, this component is handled by a technically proficient staff member to configure and manage the entire Maximizer application. For example, Administrator is used to create and manage Maximizer users, apply licensing, and create new Address Books.

You can also do tasks that are common to both Maximizer and Administrator such as backing up data, importing and exporting data, and producing reports.

Administrator can be accessed from the Maximizer program menu (Start > Programs > Maximizer > Administrator) or from the File menu in Maximizer (File > Administrator).

# Maximizer Companion Applications

There’s more to Maximizer than just the main modules. See the following descriptions of our Maximizer companion applications.

## ecBuilder

ecBuilder is an online store. Refer to the ecBuilder online manual and help installed with the application. You can access the online manual from the Start menu. ecBuilder is a separate installation available from the Maximizer CD.

## MaxAlarm

MaxAlarm is a Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start your computer, and you can leave it running with or without running Maximizer and still be notified of appointments. You’ll know if MaxAlarm is running because its icon appears in your Windows System Tray, which is in the lower right corner of your screen.

MaxAlarm is easy to use. Simply add one or more Address Books to MaxAlarm, minimize it, and then forget about it—until the Alarm dialog box pops up to remind you of an appointment. With MaxAlarm's Review feature, you can review today's appointments without opening an Address Book in Maximizer.

## MaxFinder

MaxFinder, also a Maximizer companion application, lets you browse or search for entries in a Maximizer Address Book. As with MaxAlarm, MaxFinder automatically starts when you start your computer, and its icon resides in your Windows System Tray.

MaxFinder provides a fast alternative for quick lookups and even allows you to record phone calls, time activities, or write notes for any entry in your Address Book without opening a Maximizer Address Book.

## Maximizer Form Designer

Maximizer Form Designer allows you to create custom dialog boxes (forms). When adding or modifying Address Book entries, you can then select the form you want to use. To access Maximizer Form Designer from Maximizer's Tools menu, you must choose the Maximizer Form Designer option during a custom installation.

For more information, refer to the online manual installed with Maximizer (Help menu > Maximizer Form Designer Guide). You can also refer to the Maximizer Form Designer's online help for assistance.

## Maximizer Link for the Palm OS

Maximizer and Maximizer Link for the Palm OS form a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of the Palm OS device. Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes. Simply use Maximizer Link to synchronize record additions, changes, and deletions between the two products. When data is synchronized regularly, performance speed is optimal because only records that have been modified are read during the process.

# Maximizer System Requirements

The Maximizer hardware and software requirements are listed in the following table.

Note that these are the minimum system requirements for Maximizer, and your operating system may have higher requirements for some components, such as processor speed and RAM. Refer to your operating system documentation for operating system-specific requirements.

Please see the Maximizer website at http://www.maximizer.com for the latest version of the Maximizer system requirements.

## Maximizer System Requirements

| | |
|---|---|
| Minimum Processor Speed | Pentium II, 350 MHz (minimum)<br>Pentium 4, 1.2 GHz (recommended) |
| Available RAM | 256 MB (minimum)<br>512 MB (recommended) |
| Available hard disk space | 250 MB (minimum)<br>an additional 250 MB required for installation |
| Minimum video resolution | SVGA (800x600) or higher-resolution video adapter and monitor |
| Operating system | Microsoft Windows 2000, XP[a], or 2003 (updated to the latest service pack) |
| Email system | 32-bit MAPI- or VIM-compliant email system, such as<br>Microsoft Outlook 2000/2002/2003 or Lotus Notes 4.6 or later |
| Internet browser | Microsoft Internet Explorer 6.0 |
| Database | Pervasive.SQL V9.1 Workgroup Engine (provided with Maximizer installation) |

a. Windows XP Home is not supported in a networked environment.

# Where to Go from Here...

## Explore Maximizer in a safe training ground

The Maximizer Training Guide is designed to introduce you to the fundamentals of using Maximizer. Using the example of Escona Estate Wines—a fictitious vintner in the Sonoma Valley—you can follow tutorials that take you through real-world examples of how to use the various components of Maximizer. Daily tasks in marketing, sales, and administration give you the springboard you need as a novice user to start you on your way to being a Maximizer expert.

To order the Maximizer Training Guide, contact your nearest Maximizer office or your local Maximizer Business Partner. When you order the training guide, you receive a CD demonstrating online step-by-step instructions for all tutorial exercises in the guide, as well as a printed manual to follow along with.

CHAPTER 2

# Finding Information

*Access Maximizer Help and User Guides*

## In this chapter...

# Overview

Maximizer online Help is your comprehensive guide to working with the Maximizer modules. As you work with Maximizer, you probably already know what business task you want to accomplish—such as sending a fax to many recipients, building and publishing your online catalog, and recording your contact management information. Maximizer's Help and guides have the answers you're looking for.

The types of documentation you can expect to find to help you with Maximizer include:

- **F1 Help** – context-sensitive help for all windows and dialog boxes.
- **Help Contents** – online step-by-step instructions with a table of contents, an index, and search.
- **Online manuals** – on-screen versions of the printed documentation that you can read using Adobe Acrobat Reader.

Whether you're looking for help using a particular dialog box or looking for instructions on how to perform an activity, you can always find what you're looking for in the online Help. Maximizer Help provides not only step-by-step instructions for each module, but also detailed descriptions of every control in every dialog box and window. See "Press F1 for Help" on page 13 and "Open the Help Table of Contents" on page 14.

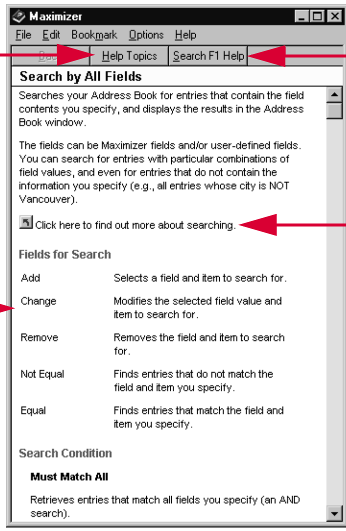
Each Maximizer module has its own Help. To find out how to use a module, select Contents from the module's Help menu or press F1 in any window or dialog box.

In addition to the Maximizer User's Guide (this book), Maximizer also includes online documentation in Adobe PDF format. You can read the PDFs using Adobe Acrobat or Acrobat Reader, which you can download from the Adobe website (www.adobe.com). See "Read the Maximizer Guides Online" on page 15.

# Press F1 for Help

If you come across a window or dialog box you don't know how to use, press the F1 key to see brief descriptions of the window or dialog box options. Frequently, F1 help topics have convenient links to related step-by-step instructions.

From the F1 Help window you can search the module's F1 Help for information on other windows, dialog boxes, or features—simply enter a keyword. Or, if you prefer to find information using a table of contents or index, click the Help Topics button in the F1 Help window.




**Click here to find step-by-step instructions and overview topics using a table of contents and index.**

**Click here to search the module's F1 Help.**

**"Shortcuts" like this one link you directly to more information about what you're doing.**

**Each feature in the window or dialog box is listed in F1 Help.**

# Open the Help Table of Contents

Each module has its own online Help that will provide you with step-by-step instructions. You can look up Help topics the same way you would in a book—the table of contents lists the topics in a logical order, and the index lets you look up topics by keyword. Maximizer Help also lets you perform a search for any word or words in any topic.

### ➤ To open the Help Contents for a module

- In any module, select **Help** > **Contents**.

### ➤ To print one topic

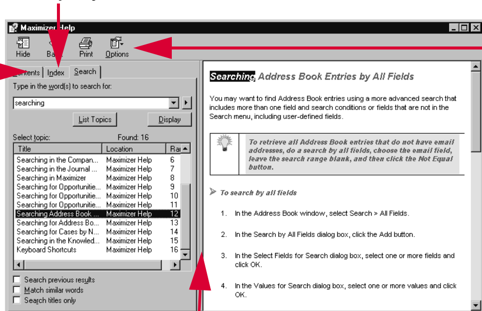
- Select the topic in the Contents and click **Print**.

### ➤ To print multiple topics

1. Select a book in the Contents.
2. Click **Print**.
3. Select **Print the selected heading and all subtopics**.

### ➤ Search for topics by any word or words

- In the **Search** tab, type the word or words you are looking for and click **List Topics**. Help lists the matching topics and ranks them by how close the topics match your search parameters.



# Read the Maximizer Guides Online

A typical installation of Maximizer includes manuals that you can read online using Adobe Acrobat or Acrobat Reader. Having the Maximizer manuals in this format offers the advantage of full-text search, as well as hyperlinks on the table of contents, index, and any cross-references.

## ➤ Install Adobe Acrobat Reader

- You need Adobe Acrobat Reader to open the online manuals. You can download the free Reader from the Adobe website (www.adobe.com).

## ➤ To access the online guides

- From the Help menu, select the guide you would like to use.

  – or –

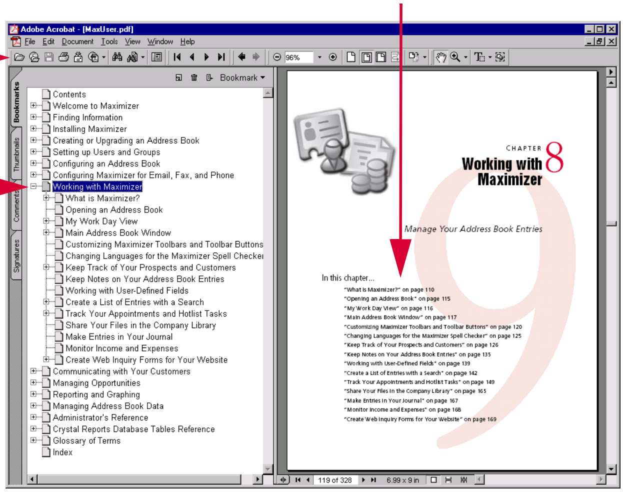
- From the Start menu, select Programs > Maximizer > Documentation and Help > Maximizer Documentation.

If you want to increase the size of the text, you can easily adjust the magnification. Open the **View** menu, and select **Zoom To**.

Click on a referenced topic page number to go directly to the topic.

Use the toolbar to navigate—turn the page, change the magnification, search for text in the manual, and more.

Click on a heading in the table of contents to open the page.




The pages appear on the screen as they would if they were printed—all of the graphics and text appear the same as in the printed manual. You can “turn the page” by using the previous and next arrows or pressing the Page Up or Page Down keys.

# Explore Maximizer with the Sample Address Books

In a typical installation of Maximizer, the Maximizer setup program creates several complete sample Address Books, one of which is named "Escona Tutorial". This Address Book is designed to be used as an environment in which you can learn how to use Maximizer. You can supplement your learning experience through the use of the Maximizer Training Guide and CD.

Using the example of Escona Estate Wines, a fictitious vintner in California's Sonoma Valley, the Escona Address Book provides realistic examples of how Maximizer might be used to improve your customer relationship management.

The Escona Address Book includes detailed data related to all areas of Maximizer including the following:

- List of Address Book entries (Companies, Individuals, and Contacts)
- Sample sales opportunities
- Appointments and hotlist tasks
- Sample Company Library files

CHAPTER 3

# Installing Maximizer

## In this chapter...

# Third-party Components Installed with Maximizer

The Maximizer installation includes the following third-party products:

- Pervasive.SQL Database Engine
- Crystal Reports (separate installation CD)
- Microsoft Data Access Components (MDAC)

The type of Maximizer installation determines which of these components are installed.

## Pervasive.SQL Database Engine

Pervasive.SQL is the database engine Maximizer uses to read and write data from the Address Book.

## Crystal Reports

Maximizer includes a full version of Crystal Reports. After installing Maximizer, you can install Crystal Reports, which has a separate installation CD. You must install the full version of Crystal Reports to create reports for Maximizer, but you can view Crystal Reports in Maximizer without installing the full version. These reports are accessible through the Reports menu in Maximizer.

The Maximizer installation creates the following folder for your personal reports:

- ...\My Documents\MaximizerReports

  This folder is the default location for personal report templates, which can be created from the Reports > Crystal Reports > Personal Custom Report menu in Maximizer. Users must belong to the Crystal Reports Users security group to use this function.

## Microsoft Data Access Components (MDAC)

MDAC is required by Maximizer. The Maximizer installation determines if MDAC is already installed on the machine and installs it if necessary.

MDAC includes the following components:

- ActiveX Data Objects (ADO)
- OLE DB
- Open Database Connectivity (ODBC)

Maximizer uses these components to integrate information from multiple sources.

# Windows Login Account Rights Required for Installation

To install Maximizer, you must be logged into Windows using an account with Windows Administrator privileges. During installation, you will be required to reboot the computer, and then you must log into Windows using an account with Windows Administrator privileges again so the installation can continue.

# Upgrading from a Previous Version of Maximizer

ALWAYS back up the Address Book before upgrading Maximizer. For instructions on backing up, refer to "Backing up and Restoring Address Book Data" on page 204. If you have customized the dictionary, also back those files up separately before upgrading.

If you are currently running an earlier version of Maximizer and want to upgrade, it is strongly recommended that you uninstall the previous version before proceeding with the upgrade.

However, if you absolutely require your Maximizer settings, such as Window layout, colors, fonts, etc., to be carried over to the new version, you can install the new version without uninstalling the previous version. The setup then prompts you to uninstall the previous version automatically, but this method does not overwrite your Maximizer settings.

The following procedure explains how to upgrade Maximizer on a Windows 2000 machine. The procedure is similar for other supported versions of the Windows operating system.

### ➤ To upgrade to the new version of Maximizer

1. Back up your Maximizer Address Book. Refer to "Backing up and Restoring Address Book Data" on page 204 for instructions.
2. If you have customized the dictionary, also back those files up separately before upgrading. For instructions, refer to "Backing up the Dictionary and Holiday Files" on page 209.
3. Uninstall Maximizer, and any additional Maximizer components such as Maximizer Link for the Palm OS, on all computers.

   You can find instructions for uninstalling Maximizer after this procedure.
4. Install the new version of Maximizer, as described in this chapter.
5. Upgrade your Maximizer Address Book database to the new version, as described in "Upgrading or Converting an Address Book" on page 47.

Uninstalling Maximizer does not uninstall your Address Book data. However, you should always back up your Address Book before uninstalling.

### ➤ To uninstall Maximizer

1. Click **Start** > **Settings** > **Control Panel** > **Add/Remove Programs**.
2. In the list of currently installed programs, select **Maximizer**.
3. Click **Change/Remove**.
4. Click **Yes** to confirm.

   The Remove Programs From Your Computer dialog box displays the uninstall progress.
5. If the Remove Shared File? dialog box opens, click **No To All**.
6. When the uninstall is complete, click **OK** to close the dialog box.
7. Reboot the computer.

# Installing the Pervasive.SQL Database Engine

The Pervsive.SQL database engine is installed on the operating system drive by default. If you want the database engine on another drive, you must install it separately.

### ➤ To install the Pervasive.SQL database engine on a non-operating system drive

1. Insert the Maximizer CD into the workstation’s CD-ROM drive.
2. Open Windows Explorer and navigate to the following folder on the CD-ROM drive:

   \Max\3RDPARTY\Pervasive\wge
3. Double-click **setup.exe** to start the installation program.
4. Follow the on-screen instructions.
5. On the Setup Type screen, select **Custom**, and click **Next**.
6. On the Custom Setup screen, click **Change**.
7. Select the drive letter where the Pervasive.SQL database engine should be installed, and click **OK**.
8. Complete the installation.
9. Install Maximizer. When prompted to update the Pervasive.SQL database engine, select **Yes**.

# Installing Maximizer

If you are installing Maximizer in a workgroup environment, complete each of the procedures listed below, in order.

| Procedure | Described on page(s)... |
|---|---|
| Install Maximizer on all computers in the workgroup. | 23 – 29 |
| Install the licenses for Maximizer and Pervasive Workgroup Engine on the computer that will host the Maximizer Address Book. | 35 – 36 |
| Create an Address Book on the Address Book host computer.<br>If you already have a Maximizer Address Book set up, you can skip this step.<br>Although you don't have to complete all the steps listed in "Checklist: Setting up a New Address Book", you must create all user accounts that will be accessing the shared Address Book before proceeding. Depending on your needs, you can go back and adjust security for each user after you have the workgroup environment up and running. | 41 – 47 |
| Share the Address Book folder. By default, the Address Book is located in the ...\Documents and Settings\<user>\Application Data\Maximizer\ AddrBks\<Addresss Book> folder. | Refer to your Windows OS documentation. |
| On the Address Book host computer, ensure you can connect to each of the other workgroup computers by pinging each one from the host computer. | Refer to your Windows OS documentation. |
| On each of the other workgroup computers, map a network drive to the Address Book host computer's shared Address Book folder. | Refer to your Windows OS documentation. |
| On each of the other workgroup computers, open Maximizer and select File > New Address Book. Enter the Address Book name and click the ellipsis button beside the Location of the Address Book field to browse to the shared Address Book folder.<br>Note that if the Address Book does not yet exist on the Address Book host computer, you must create and share it before browsing to it from other workgroup computers. | n/a |

| Procedure | Described on page(s)... |
|---|---|
| On the Address Book host computer, configure the Pervasive Gateway to a Fixed Gateway if necessary. Although Maximizer does not require that you configure a gateway, it may be beneficial in terms of network performance to do so. | 30 – 32 |

## Installing Maximizer

You must be logged into Windows as an administrator to install Maximizer. After installation, it prompts you to restart the computer, and then you must log in as an administrator again to complete the installation.

File sharing must be enabled on the Address Book host computer to successfully install Maximizer. For information about enabling file sharing, refer to your Windows documentation.

These steps are based on the Windows 2000 Server operating system. Program names and locations may be different depending on the version of Windows you are using.

An installation wizard steps you through the process of installing the software on the server. The instructions in this section complement the wizard to provide additional information.

### ➤ To install Maximizer

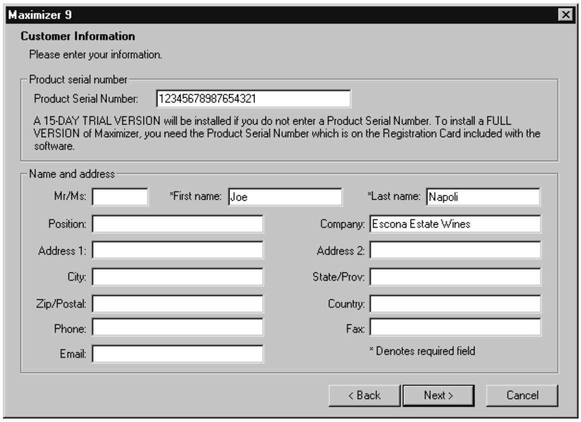
1. Close all programs running on the computer.
2. Insert the Maximizer CD in the computer’s CD-ROM drive.

   The setup starts automatically.

   If the setup doesn’t start automatically, you can start it manually by running setup.exe from the Max folder of the CD (e.g., \Max\setup.exe).
3. Select **Install Maximizer**.

   The InstallShield Wizard starts.
4. Click **Next** to begin the installation.
5. Read the license agreement, and click **Yes** to continue.

6 Enter your **Product Serial Number**, **First name**, and **Last name** into the required fields, and click **Next**.



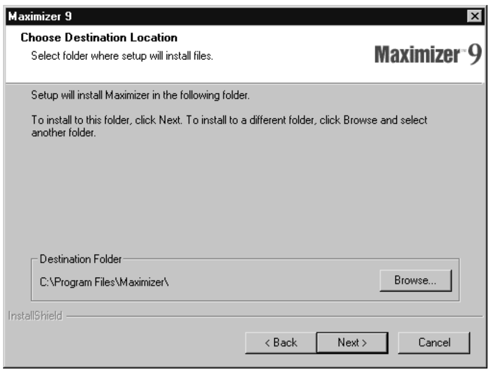

7 Read the Release Notes, and click **Next**.

Do not change any default share names, file names, file locations, folder names, or folder locations after installing Maximizer. If you want to use names and locations other than the defaults, change them during the installation.

8 Click **Next** to install Maximizer components to the default location.

– or –

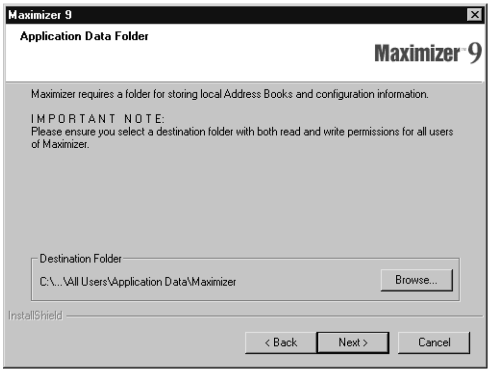
Click **Browse**, select a destination folder, and click **Next**.



**9** Click **Next** to use the default folder for shared configuration information.

– or –

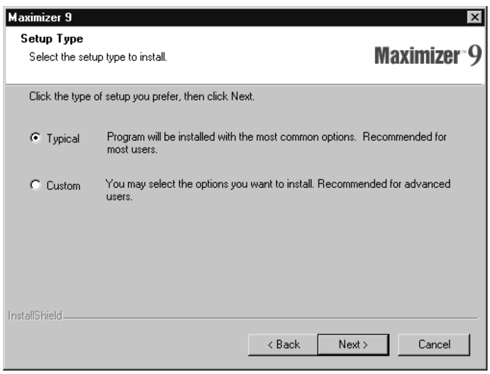
Click **Browse**, select a local shared folder, and click **Next**.




ⓘ By default, the installation creates the "Maximizer" folder in the Program Files folder on the drive where the Windows operating system is installed. If your Windows operating system is not on the C drive, the path will have a different drive letter.

By default, Maximizer setup creates the folder **...\Documents and Settings\All Users\Application Data\Maximizer**, and it creates a shared subfolder called **AddrBks**. In a workgroup environment, this folder must be shared on the network so other computers can access resources installed to this location.

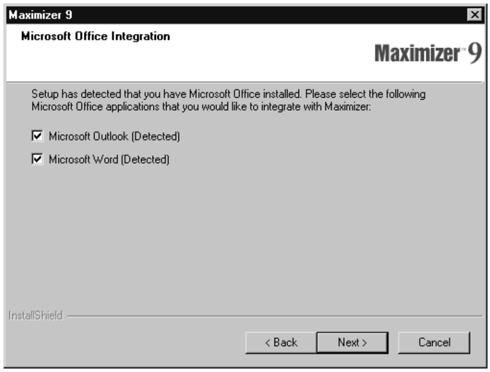
**10** Select a setup type, and click **Next**.




**Typical** installs a default set of software, such as drivers. It also installs a default set of Maximizer applications. Maximizer recommends that you select the Typical installation unless you have a specific reason not to.

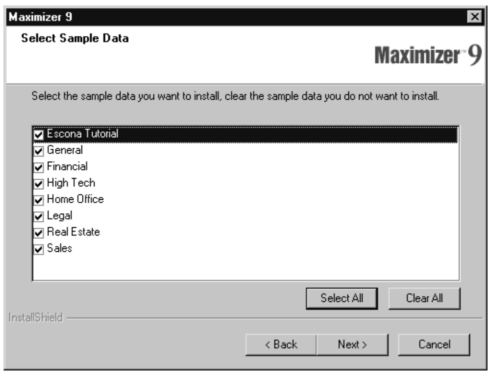
**Custom** enables you to select specific Maximizer modules to install. Select this option only if you have a specific reason to alter the default Maximizer installation provided by the Typical installation. If you would like to install additional components, such as Form Designer, click the + to expand the selection.

11 If you have Microsoft Outlook or Microsoft Word installed, the wizard prompts you to integrate either or both of those applications with Maximizer. Select which applications to integrate, and click **Next**.

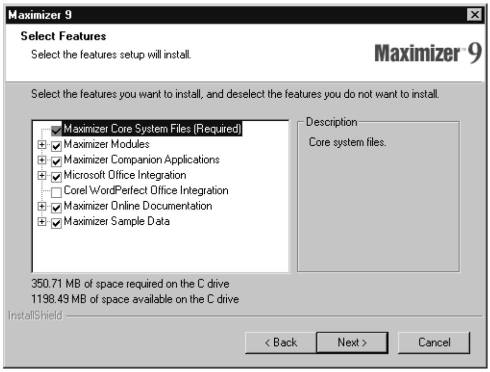



12 **(This step applies to Typical installations only.)** Select any sample Address Books to install, and click **Next**.

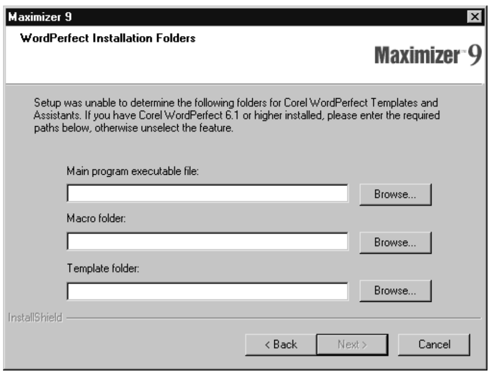
The Maximizer documentation uses the Escona Tutorial for its examples and tutorials. Sample Address Books enable you to practice working with Maximizer without affecting the working Address Book(s). Sample Address Books also help administrators run test scenarios.



**13** **(This step applies to Custom Installations only.)** Select which features to install, and click **Next**.



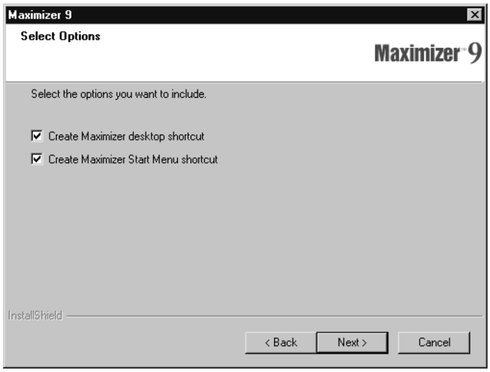

**14** **(This step applies to the Corel WordPerfect Office Integration option only.)** If the setup cannot locate Corel WordPerfect Office on the computer, it prompts you to provide the path to these files and folders. Click **Browse** to select the correct paths, and click **Next**.



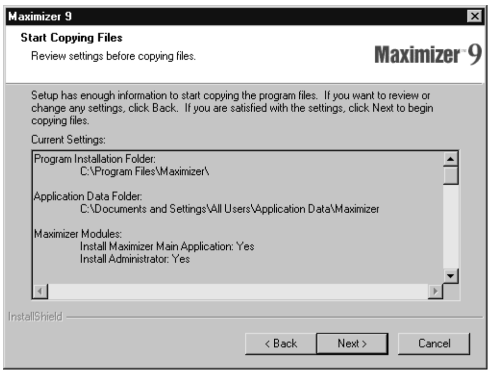
15 Select any of the following options, and then click **Next**:

**Create Maximizer desktop shortcut** creates an icon on the Windows desktop that runs Maximizer when you double-click it.

**Create Maximizer Start Menu shortcut** creates a shortcut to Maximizer on the Windows Start menu.



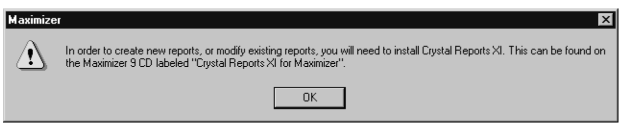

16 Review the installation settings, and click **Next** to begin installing.



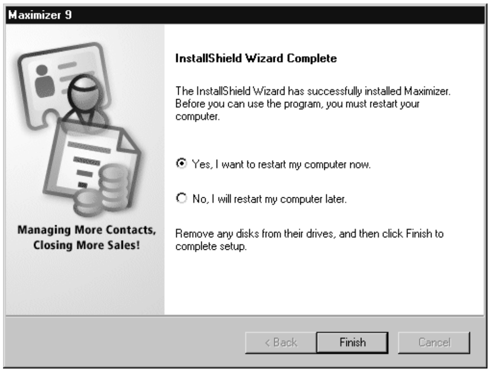

The wizard displays an installation progress indicator.

When the installation is complete, you will see the following message. After restarting your computer, you can install Crystal Reports from the Crystal Reports XI for Maximizer CD.

17 Click **OK** to close the message box.



The installation wizard prompts you to restart the computer.




18 Click **Finish** to close the wizard and restart the computer.

19 After the computer restarts, log into Windows using an administrator account. This step is required to complete the installation.

Maximizer is now installed.

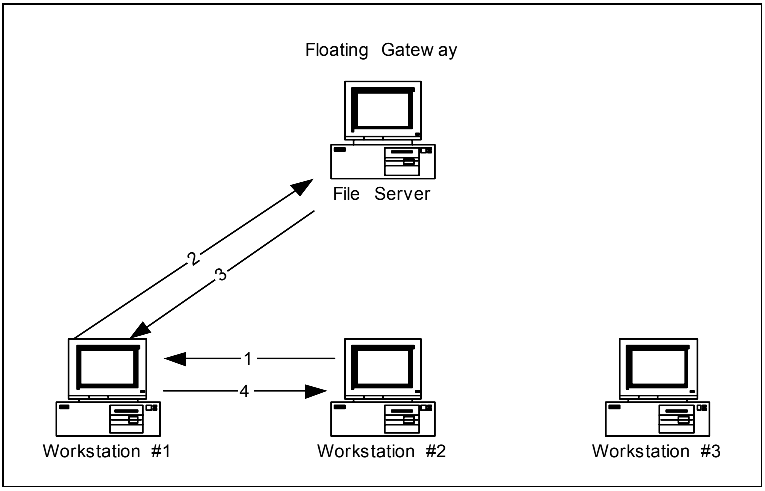
If you are installing Maximizer in a workgroup environment, you must share the Address Book folder before it will be accessible from the other machines in the workgroup. By default, the Address Book is located in ...\Documents and Settings\<user>\Application Data\Maximizer\AddrBks\<AddressBook>.

# Establishing a Fixed Gateway

A gateway is a computer that serves data to and receives requests from workstations. Essentially, a gateway can be considered a mini-client/server. Data flows into and out of the database through one computer.

By default, Maximizer is installed with a floating gateway configuration. You can leave the gateway configuration as the default floating gateway. However, you must ensure that the gateway computer is left on at all times when the workgroup computers are accessing the Maximizer Address Book.

A machine becomes the gateway engine when it is the first machine to access a remote Address Book (database). This machine remains the gateway engine until all connections to the Address Book are closed.



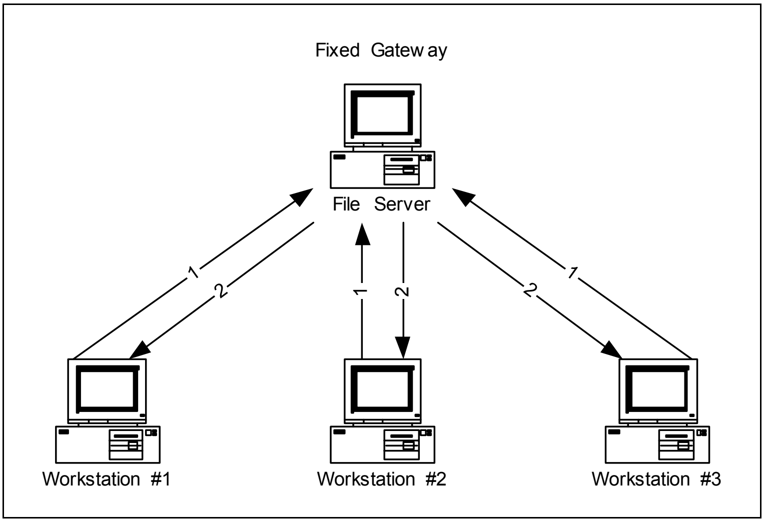

In the floating gateway diagram, Workstation#1 was the first machine to access the Maximizer Address Book. By doing so, it is set as the workgroup engine. When Workstation#2 makes a request for data, the request is sent to Workstation#1. The Pervasive.SQL Workgroup on Workstation#1 must then go over the network, retrieve the entire database file (in order to read the database), retrieve the record(s) requested by Workstation#2, and then send the data back the requesting workstation (in this case Workstation#2).

Alternatively, you can configure the server computer as a fixed gateway.

## Benefits of a Fixed Gateway

Establishing a fixed gateway allows all workstations to access the data through the same machine, the server. If a fixed gateway is not established, Maximizer will use a floating gateway. A floating gateway means the first workstation to load the Maximizer database will be the gateway computer for the other workstations. If the first workstation exits Maximizer and shuts down the workstation, the other workstations won't have a gateway in which to retrieve or send data. Errors occur and data integrity is compromised.

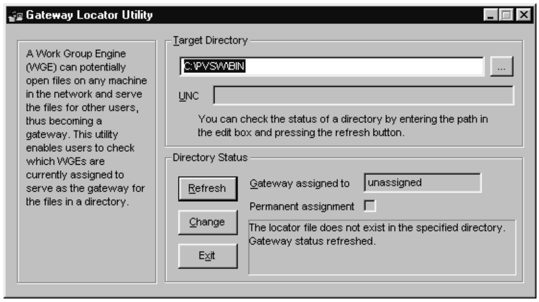
Therefore, using a fixed gateway, where the gateway computer is always on or is the first computer turned on and the last computer turned off, is more stable than using a floating gateway.



# Setting the Gateway

## ➤ To establish a fixed gateway

1. Open the **Gateway Locator** from the **Pervasive.SQL** > **Other Utilities** menu in the Windows **Start** menu.




2. In the **Target Directory** field, type the folder path where the Address Book files are located.

   – or –

   Click the ellipsis button to browse to the desired Maximizer Address Book.
3. Once you've specified the target folder, click **Change**.
4. Select the name of the gateway computer, and click **OK**.
5. Click **Refresh** and then click **Exit**.
6. Repeat steps 1 to 4 for each Address Book that you want to read with a fixed gateway locator.
7. If you are unable to change the gateway, reboot the computer and try again. The computer may have Pervasive support files stored in memory.

# Installing ecBuilder Pro Lite

To upgrade to the full version of ecBuilder, contact your nearest Maximizer office.

ecBuilder is a wizard-based website creation program, complete with an online catalog, credit card ordering, and encrypted security. Orders and inquiries generated by the catalog site are automatically integrated with Maximizer's OrderDesk window.

In addition to the software used for creating your online catalog, the ecBuilder installation includes sample catalogs and detailed online documentation.

### ➤ To install ecBuilder Pro Lite

1. Close all programs running on the computer.
2. Insert the Maximizer CD in the computer's CD-ROM drive.
3. The setup starts automatically.
4. Select **Install ecBuilder Pro 6.0 Lite**.
5. Click **Next**, and follow the on-screen instructions to complete the installation.

Your Maximizer software comes with a product serial number for ecBuilder Pro Lite. Enter this number when you reach the product registration screen.

# Installing Maximizer Link for the Palm OS

Maximizer Link for the Palm OS (Maximizer Link), the tool for synchronizing your data with your Palm operating system device, is available from the Maximizer website as a download.

The Maximizer Link installation includes a Quick Reference guide to get you started, as well as a detailed manual with step-by-step instructions on using Maximizer Link. These manuals are in PDF format.

### ➤ To install Maximizer Link for the Palm OS

1. Close all programs running on the computer.
2. Browse to the location of your Maximizer Link Setup files. These are the files you download from the Maximizer website.
3. Double-click the **Autorun.exe** and follow the on-screen instructions to complete the installation.

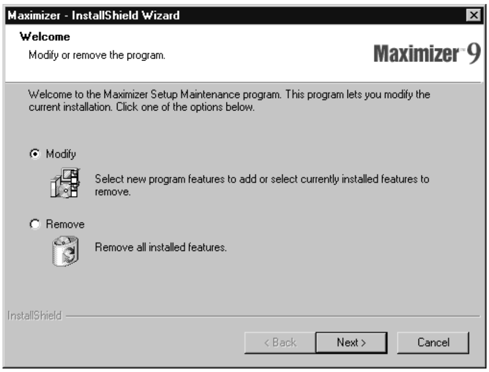
# Adding and Removing Maximizer Components

Maximizer enables you to add and remove specific components of the software without having to reinstall Maximizer itself.

### ➤ To add or remove Maximizer components

1. Close all programs running on the computer
2. Insert the Maximizer CD in the computer's CD-ROM drive.
3. On the Setup CD Autorun screen, select **Install Maximizer**.

   If the setup doesn't start automatically, you can start it manually by running setup.exe from the Max folder of the CD (e.g., \Max\setup.exe).
4. Select **Modify**, and click **Next**.




Expand the branches to add or remove sub-components.

   Checkboxes are automatically selected for any currently installed components.
5. Select the checkbox beside any components to add.
6. Clear the checkbox beside any components to remove.

   If a component is already installed, and you want to keep it, do not clear the checkbox beside that component.
7. Click **Next**.

   Maximizer begins the update.

# Installing Licenses

When you purchase licenses from Maximizer Software, you receive a Product License Number (PLN), which includes licenses for a specified number of users. Maximizer comes with a default single-user license. Because Maximizer licenses are stackable, any additional licenses applied to Maximizer will be added to your current license count. For example, if you have the default single-user license and want to upgrade to eight licenses, you need a new PLN for seven users only, and you can apply it in addition to the original single-user PLN.

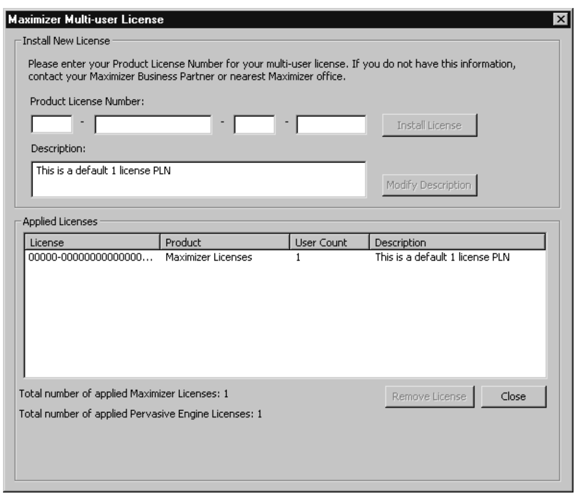
Note that the MASTER user account is always enabled, and it consumes a license only if you are logged into Maximizer using the MASTER user account.

## Installing a License

After you install Maximizer or purchase additional licenses, you must install the PLN(s). Pervasive Workgroup licenses must be installed from the Workgroup Server.

### ➤ To install a product license number (PLN)

1. Run Administrator.
2. Select **Utilities** > **Install Multi-User License**.
3. Enter the PLN.
4. Click **Install License**.




5. Repeat steps 3 and 4 to install any additional licenses.

6. Click **Close**.

   Administrator closes automatically.

   The next step is to apply the PLN(s) to the Address Books.

## Applying a License

After you have installed a PLN, you must apply it to the Maximizer Address Book(s).

### ➤ To apply a product license number (PLN)

1. After installing the license as described above, start Administrator.
2. Open and close each Address Book that you are applying licenses to.

   The license has now been applied to the Address Book(s).

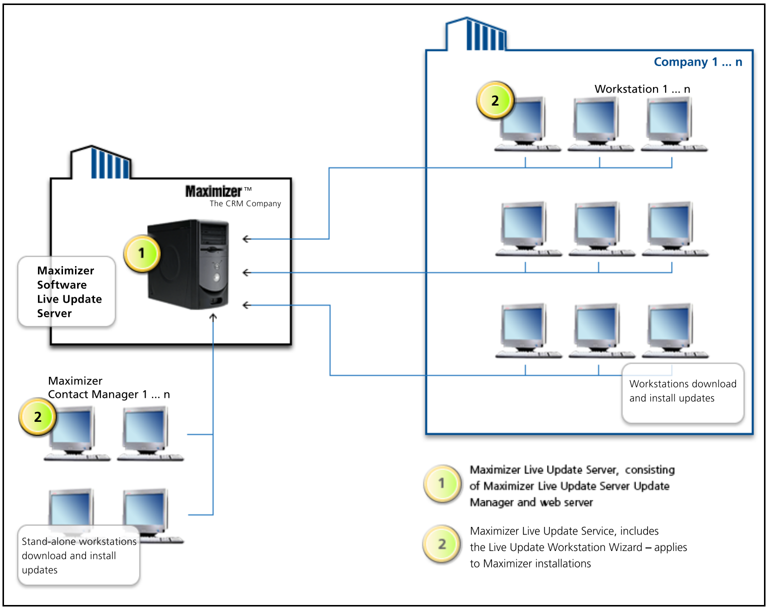
## Viewing Applied and In-use Licenses

### ➤ To view the number of applied and in-use licenses

- In Administrator, select **Reports** > **Current Users**.

# Updating Maximizer Installations with Live Update

The Live Update Wizard connects to the Maximizer Live Update Server and downloads any available updates for your local Maximizer installation.

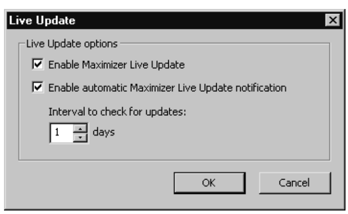



By default, Live Update is enabled, automatic notifications are enabled, and the interval to check for updates is set to 1 day. You can modify these preferences as required in Administrator.

### ➤ To configure Live Update preferences

1. Start Administrator (Start > Programs > Maximizer > Administrator) and log into the Address Book.
2. Select **File** > **Preferences**.
3. On the System Options tab, click **Live Update**.
4. Update any of the preferences as desired, and click **OK**.

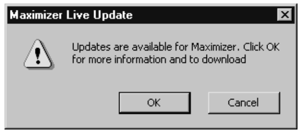
Press F1 in the Live Update dialog box for information about each of the settings.


Live Update
Live Update options
☑ Enable Maximizer Live Update
☑ Enable automatic Maximizer Live Update notification
Interval to check for updates:
1 days
OK Cancel

Live Update options in Administrator are accessible through the Live Update button on the System Options tab in File > Preferences.

## ➤ To start the Live Update Wizard

- If the **Enable automatic Maximizer Live Update notification** option is selected in the Live Update options in Administrator, a message box (shown below) notifies you when new updates are available. Click **OK** to start the Live Update Wizard.




– or –

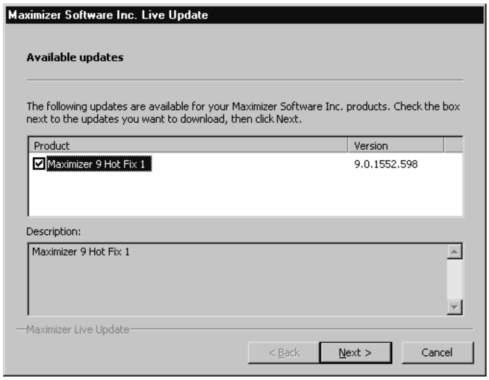
- In Administrator or Maximizer, select **Help** > **Maximizer Live Update**.

## ➤ To download software updates from the server

1. Start the **Live Update Wizard** as described above.

**2** Click **Next**.

The Live Update Wizard connects to the Live Update Server to check for any available updates.




**3** Select the update(s) to download.

**4** Click **Next** to download the selected updates.


**5** Click **Finish** to close the wizard.

The downloaded executable file should launch immediately to start the installation.

# Where to Go from Here...

- Create a new Address Book or upgrade an existing Address Book to the latest version of Maximizer, as described in chapter 4 "Creating or Upgrading an Address Book" on page 41.
- Create login accounts for Maximizer users and assign users to security groups, as described in chapter 5 "Setting up Users and Groups" on page 49.
- Configure Address Book preferences, including duplicate Address Book entry handling, user-defined fields, and key fields, as described in chapter 6 "Configuring an Address Book" on page 67.
- For more information on converting a database, please refer to chapter 12 "Managing Address Book Data" on page 203.

CHAPTER 4

# Creating or Upgrading an Address Book

## In this chapter...

# What is Administrator?

Administrator is the administrative center of Maximizer. Use it to

- manage users and security groups,
- create and configure Address Books, and
- manage Maximizer application settings.

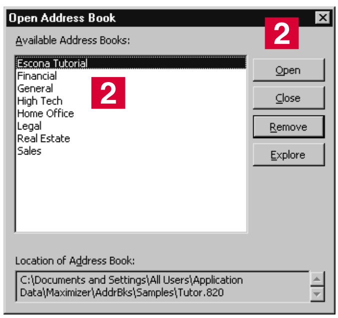
Once Administrator is running, you can open any Address Book and perform administrative tasks. There will be no database conflicts if you open an Address Book while it is in use by another user. (However, you should ensure all users have logged out before backing up or restoring the Address Book.) Also, changes to the user's settings require the corresponding logged-in user to log into the Address Book again before the settings will take effect.

### ➤ To start Administrator

- Click **Start** > **Programs** > **Maximizer** > **Administrator**.

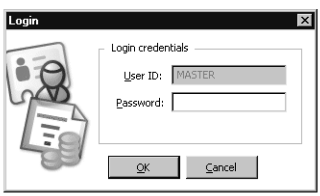
### ➤ To open an Address Book in Administrator

1. Start Administrator.
2. Select an Address Book, and click **Open**.




The default MASTER user password is "control", unless it has already been changed to another password in any Maximizer Address Book.

3. Type the **Password**, and click **OK**.




The selected Address Book opens in Administrator.

# Creating a New Address Book

Sample Address Books are installed with Maximizer and demonstrate how a company would use Maximizer. Do not use the sample Address Book for your own data.

Once you have familiarized yourself with Maximizer by using a sample Address Book, such as Escona Tutorial, your first administrative task is to set up a new Address Book.

Administrator makes it easy to create your Address Book in a few steps, and even enables you to create it using some of the settings from an existing Address Book, such as preferences, templates, user-defined fields, and macros.

For information about transferring Address Book information, refer to "Importing Address Book Data from MXI or XML Files" on page 218 and "Transferring Entries between Address Books" on page 241.

Once you've created the Address Book, set up user accounts and configure security and preferences. If you need to add entries from another Address Book, Maximizer can transfer those entries to the new Address Book. Any user can transfer Address Book information, provided that they have sufficient security privileges in their account.

## Checklist: Setting up a New Address Book

These steps highlight the major tasks involved in creating a new Address Book.

Use this list to help you set up a new Maximizer Address Book. Perform these steps in the order shown here.

1. **Create the new Address Book.** For detailed information, refer to "Creating a New Address Book" on page 44.
2. **Change the MASTER user password.** For instructions, refer to "Changing the MASTER User Password" on page 46.
3. **Add users to the Address Book.** When you create a new Address Book, it contains only the MASTER user account. Create an account for each Maximizer user.

   Note that if you are not running Maximizer in a multi-user environment, you do not need to add user accounts or set up user and group security.
4. **Set up security for users and security groups.** You may want some users to have more access to your Address Book data than other users. Administrator lets you restrict access to specific users and groups of users. For information about users and security groups, refer to "Setting up Users and Groups" on page 49.
5. **Test the Address Book.** In Maximizer, log into the new Address Book with one or more of the new user accounts, or as the MASTER user if you did not create any new user accounts.

# Creating a New Address Book

The location of this folder may be different if you specified a different folder during the Maximizer installation.

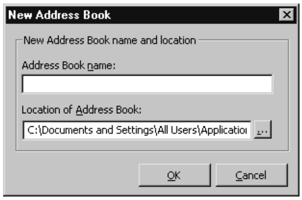
Use Administrator or Maximizer to create new Address Books.

Maximizer Address Book files are stored in the ...\Documents and Settings\<users>\Application Data\Maximizer\AddrBks folder. If other users should be able to access these database files, you must grant those users access permissions to the folder.

After the new Address Book is created and added to the list of Address Books in Maximizer, each networked computer receives the updated Address Book list when logging in.

### ➤ To create a new Address Book

1. Select **File** > **New Address Book**.

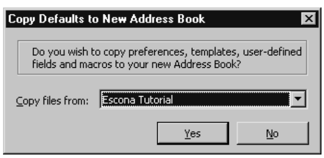



2. Type the name of the new Address Book in the **Address Book name** field, and click **OK**.

   Maximizer prompts you to confirm the creation of the new Address Book folder.

3. Click **OK**.

   Maximizer prompts you to copy defaults from an existing Address Book to the new Address Book.




4. Click **Yes** to copy the default settings, or click **No** to create a blank Address Book.

   Maximizer creates the new Address Book.

# Maximizer System Login Account

When you create a new Maximizer Address Book, the MASTER user account is created automatically. This account is required to log into the Administrator module of Maximizer and to perform administrative tasks.

It is important to leave the MASTER user account active and with its default settings. Maximizer requires this account to function correctly. However, it is important to change the password for this account from its default immediately after creating an Address Book. For instructions on changing the account password, refer to "Changing the MASTER User Password" on page 46.

Note that the MASTER user account is always enabled, and it consumes a license only if you are logged into Maximizer with the MASTER user account.

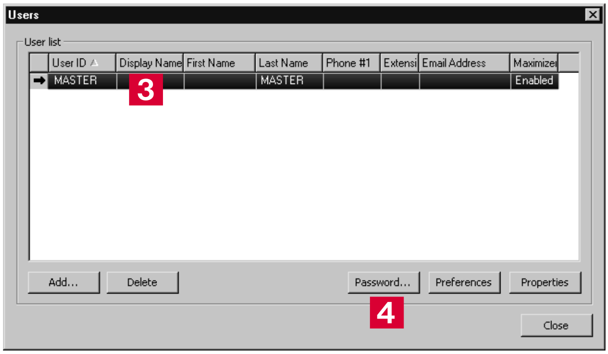
# Changing the MASTER User Password

If the MASTER password for an existing Address Book has been changed, and then you create a new Address Book, the new Address Book will have the same password as the existing Address Book, and not "control".

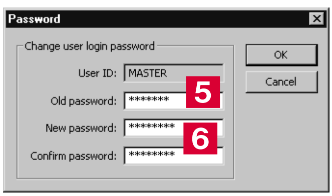
The default password for the MASTER user is **control**. For security reasons, you should change this password immediately after creating a new Address Book.

## ➤ To change the MASTER user password

1. Run Administrator and log into the Address Book as MASTER.
2. Select **File** > **Users**.
3. Select **MASTER** from the user list.




4. Click **Password**.
5. In the **Old password** field, type **control** (or the current password if you have changed the MASTER password before).
6. In the **New password** and **Confirm password** fields, type the new MASTER user password, and click **OK**.




The MASTER user password has now been changed.

# Upgrading or Converting an Address Book

ALWAYS back up the Address Book before upgrading. For instructions on backing up, refer to "Backing up and Restoring Address Book Data" on page 204. If you have customized the dictionary and holidays, also back those files up separately before upgrading.

Administrator has a built-in utility to convert existing Maximizer database from older versions to the current version.

If you are upgrading Maximizer from a previous version and you have old reports in the Crystal Reports file structure for Maximizer, the old reports are archived in a folder named after the Address Book with a .BAK file extension, where your other report files for Maximizer are stored (e.g., ...\My Documents\MaximizerReports\Reports\<Address Book>.BAK folder). You can copy the reports to any of your working folders to access the reports from Maximizer.

After upgrading a database, you should always perform an Address Book validation and recovery. For further information, refer to "Verifying and Recovering an Address Book" on page 210.

## Upgrading a Maximizer Address Book

Simply opening the Address Book in Administrator upgrades it to the current version. However, you can also upgrade an Address Book using the upgrade utility in Administrator.

### ➤ To upgrade a Maximizer Address Book

1. Ensure Maximizer is closed on all machines before proceeding with the upgrade.
2. If you have an Address Book open in Administrator, select **File** > **Close Address Book**.
3. Select **Utilities** > **Upgrade Maximizer Address Book**.
4. Select **Yes** when prompted to continue.
5. Select the Address Book from the available Address Book list, and click **Open**.
6. Enter the MASTER user's **Password**, and click **OK**.

   The process of opening the Address Book upgrades the data.
7. If the Address Book doesn't appear in the list of Address Books, choose **File** > **New Address Book**, browse to the Address Book, and click **Open**.

# Importing Vertical Templates

Maximizer provides vertical templates for several industries. You can import any of these vertical templates into your Address Book. A vertical template creates industry-specific user-defined fields, action plans, search catalogs, column setups, document templates, etc. in your Maximizer Address Book.

## ➤ To import a vertical template

1. Log into the Address Book in Administrator or Maximizer.

   You must be logged in as MASTER to import a vertical template.

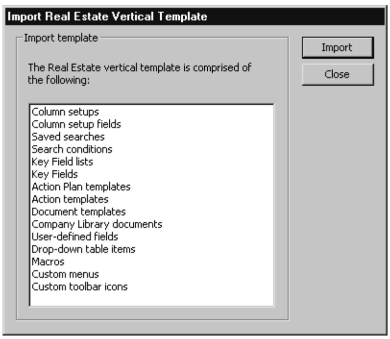
2. Select **File > Import > Vertical Templates > [industry]**.

   The Import [industry] Vertical Template dialog box opens, displaying the items included in the template.

3. Click **Import**.

   Items in the list are highlighted as the import process advances.

   When the import process is complete, an Import Summary displays the number of items imported with the vertical template.



# CHAPTER 5
# Setting up Users and Groups

## In this chapter...

# Adding a User to an Address Book

Log in as the MASTER user in Administrator to perform setup or administrative tasks. The default password for MASTER is "control", but it may be different if it has already been changed in any Address Book. To use Maximizer, you should create a personal user ID for yourself.

If you are using Maximizer in a single-user environment and do not want to use user security, simply use the MASTER user account.

Before a user can log into Maximizer, you must assign that person a Maximizer user ID. All security in Maximizer is based on user IDs and the rights you assign to them. You should also assign a user Display Name, which easily identifies the user throughout Maximizer. When you fill in the First name and Last name fields in the Add User dialog box, the Display name field is completed automatically to include the user's first and last name together. You can change this display name.

The user's name and contact information can be inserted as merge fields in the word processor.

Use the User Properties dialog box to enter a user's name and contact information, assign user-defined fields, specify access rights, and add a user to security groups. Note that you can also add users to security groups using the Security Groups tab.

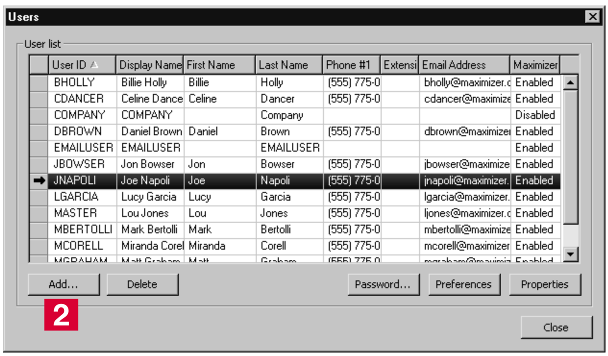
### ➤ To add a new user to the Address Book

The Users dialog box is available in both Maximizer and Administrator, where users can view other users' information and modify their own.

1. Select **File** > **Users**.

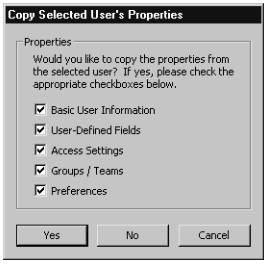
   The Users dialog box opens.

2. Click **Add**.




The Copy Selected User's Settings dialog box opens.

**3** Click **Yes** to copy the settings from the selected user, or **No** to start with the default settings.



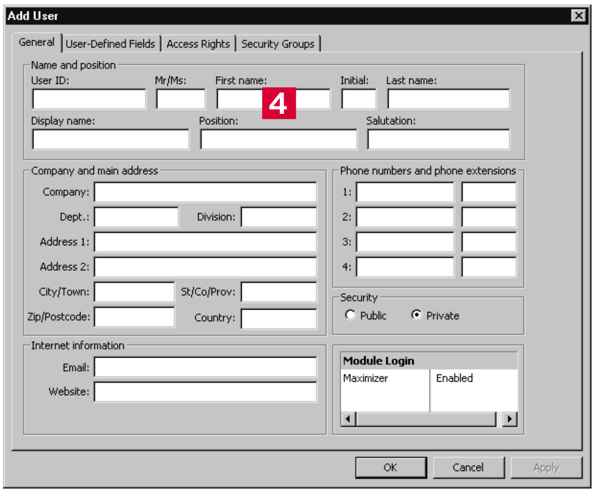

The Add User dialog box opens.

**4** Fill in the information for this user in the **General** tab.

The User ID and Last name fields are the only required fields, and the User ID is needed to log into the Address Book.

Save time by filling in only the **User ID**, **First name**, and **Last name** fields, and let the user fill out the rest of the information.

The **Display name** field fills in automatically with the user's first and last names. You can change the display name.

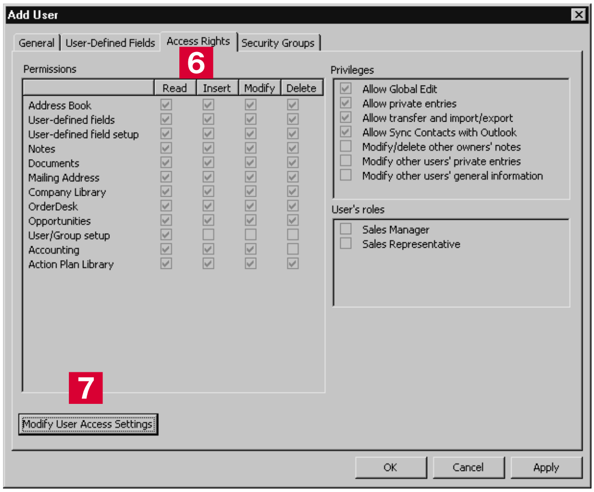



**5** In the **User-Defined Fields** tab, select the values of any user-defined fields, as appropriate.

You can set up these custom fields in the File > Set Up User-Defined Fields dialog box. Refer to “Setting up User-Defined Fields for an Address Book” on page 74 for more information.

6 Click the **Access Rights** tab.

7 Click the **Modify User Access Settings** button.




8 Modify any of these settings as appropriate.

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 54.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 55.

9 Click **OK** to close the Access Settings dialog box.

10 In the **Security Groups** tab, select any security groups to which the user should belong.

(To add groups and teams, use the File > Security Groups dialog box.)

11 Click **OK**.

The default user password is **maximizer**. Ensure that you or the user create a new password from the Users dialog box.

The new User ID and its associated information now appear in the User list.

# Changing a User's Password

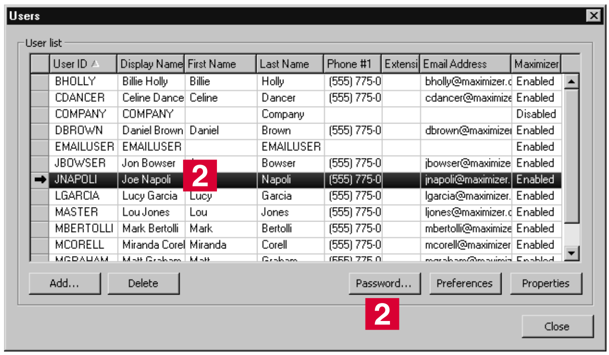
The following procedure explains how to change user passwords in Administrator. However, users can also change their own passwords through the File > Users dialog box in Maximizer.

### ➤ To set and change a user's password through Administrator

1. In Administrator or Maximizer, select **File** > **Users**.

   The Users dialog box opens.

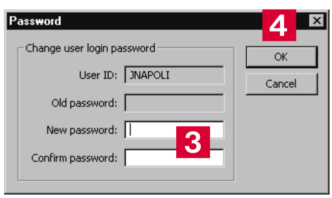
2. Select the user whose password you wish to change, and click **Password**.




   The Password dialog box opens.

3. Type the new password, then retype it on the next line to confirm it.

4. Click **OK** to accept the change of password and close the dialog box.




ⓘ The default password for a new user is "maximizer".

# User and Group Security

As the Administrator, you can restrict each user's access rights to types of entries, essentially providing per-module security. User access rights are accessible through **File** > **User** > **[User ID]** > **Properties** > **Access Rights**. These user access rights consist of the access settings (security settings) of the user account as well as the access settings of any security groups the user is a member of. For example, if the Opportunity Delete permission is not granted in the user's access settings, but is granted in the access settings of a group the user is a member of, then the user is granted Delete permissions to Opportunity entries.

Each checkbox contains one of the following potential values:

| Checkbox State | Access Setting | Access Right |
|---|---|---|
| ☑ | Granted | Granted |
| ☐ | Not Granted | Not Granted |
| ☒ | Black = Denied<br>Grey = Disabled | n/a |

The following table illustrates user access rights derived from user and group access settings.

| User Access Setting | + | Group Access Setting | = | User Access Right |
|---|---|---|---|---|
| ☐ | + | ☐ | = | ☐ |
| ☐ | + | ☑ | = | ☑ |
| ☑ | + | ☐ | = | ☑ |
| ☐ | + | ☒ | = | ☐ |
| ☒ | + | ☐ | = | ☐ |
| ☑ | + | ☒ | = | ☐ |
| ☒ | + | ☑ | = | ☐ |
| ☒ | + | ☒ | = | ☐ |

If the user belongs to more than one group, the conflict illustrated below results in the user not being granted the access right.

| User or Group Access Setting | + | User or Group Access Setting | + | User or Group Access Setting | = | User Access Right |
|---|---|---|---|---|---|---|
| ☐ | + | ☑ | + | ☒ | = | ☐ |

# User Access Rights and User/Group Access Settings

If a Read permission is denied (X), then the Insert, Modify, and Delete permissions are automatically disabled. A user cannot have Insert, Modify, or Delete permissions without having Read permission.

The following tables describe each of the user access rights and user or group access settings.

### Permissions

| **Permissions** | **Controls the selected user's or group's right to view, add, change, or remove . . .** |
|---|---|
| Address Book | Entries in the Address Book window |
| User-defined fields | Values in user-defined fields |
| User-defined field setup | User-defined field definitions |
| Notes | Entries in the Notes following window<br>Users must have the Delete checkbox selected to be able to use the File > Purge > Notes function. |
| Documents | Entries in the Documents following window<br>Users must have the Delete checkbox selected to be able to use the File > Purge > Documents function. |
| Mailing Address | Mailing addresses of Address Book entries |
| Company Library | Files and folders in the Company Library |
| OrderDesk | Entries in the OrderDesk window |
| Opportunities | Entries in the Opportunities window |
| User/Group setup | Users and Security Groups<br>• If the user does not have any User/Group Setup rights, other users' or groups' properties are not accessible.<br>• If the user has read rights only, the related tabs are visible, but information cannot be modified.<br>• Insert, Modify, and Delete rights provide the corresponding access rights to all user and group properties. |
| Accounting | Accounting Link transactions<br>Note that the Delete permission is disabled because Accounting Link transactions cannot be deleted through Maximizer. |
| Action Plan Library | Action plans in the Action Plan Library |

### Privileges

| Privilege | Grants authorization to . . . |
|---|---|
| Allow Global Edit | Perform global edits of Address Book entries in Maximizer (Edit > Global Edit). Consider advising users with this privilege to back up the Address Book before making significant changes with Global Edit. |
| Allow private entries | Add Address Book entries that are not visible to other users. The user can use the Owner, Full Access, or Read Access fields to create private entries or restrict entries to a group. |
| Allow transfer and import/export | Transfer Address Book entries between Maximizer Address Books or import/export Address Book entries to or from another application. The only entries that cannot be transferred or imported/exported are encrypted user-defined fields. Note that if you do not select this option, the menu items for importing and exporting data are disabled. This option also applies to the security right to export information to Excel. |
| Allow Sync Contacts with Outlook | Enable the "Synchronize with Outlook" command on the Tools menu and the icon on the standard toolbar in Maximizer. |
| Modify/delete other owners' notes | Change and delete other users' notes. However, to be able to view other users' private notes, the user must have the "Modify other users' private entries" privilege enabled. |
| Modify other users' private entries | View and modify entries marked as private that belong to other users.<br><br>If a user has this privilege enabled, the user has full read and modify access to all entries, regardless of the entry's Full Access, Read Access, or Owner settings. This security privilege is very powerful and should be granted with caution. |

| Privilege | Grants authorization to . . . |
|---|---|
| Modify other users' general information | Change information in the General and User-Defined Fields tabs of the User Properties dialog box for another user.<br>Modifying a user's general information, such as Last Name, First Name, Company, and Phone Number, does not have to be restricted to the MASTER user. In many cases, an administrative assistant or a receptionist can be granted the rights to modify user's general information without compromising the security of Maximizer. This privilege allows the user to have access to all Maximizer users' general information without giving them full security rights to the Address Book. |

### User's Roles

| User Role | Grants authorization to . . . |
|---|---|
| Sales Manager | Belong to the Account Manager field. Sales Managers can also re-assign the Account Manager field to a different user. |
| Sales Representative | Similar to the Sales Manager role, Sales Representatives can be assigned to the Account Manager field. A Sales Representative can assign the Account Manager field to anyone else, but only if the Account Manager field was assigned to him/herself or blank and not assigned to another user. |

## Modifying User Access Settings

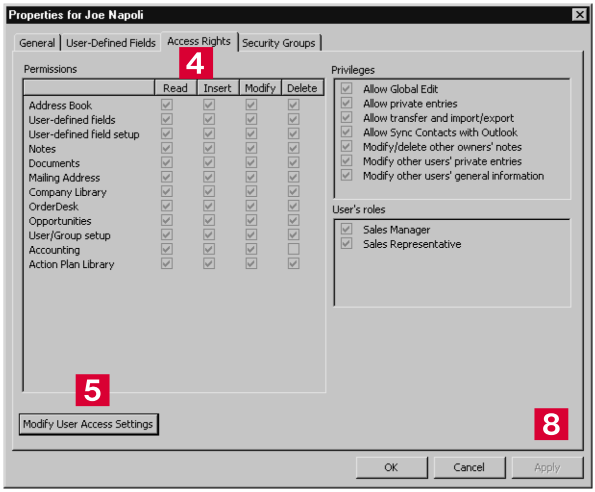
For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 54.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 55.

### ➤ To modify access settings of an existing user

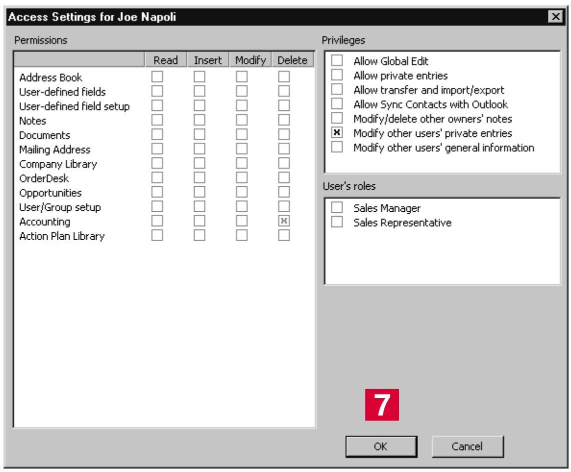
1. Select **File** > **Users**.
2. Select the **User ID**.
3. Click **Properties**.

**4** Click the **Access Rights** tab.




**5** Click the **Modify User Access Settings** button.

**6** Modify any of these settings as appropriate.




**7** Click **OK** to close the Access Settings dialog box.

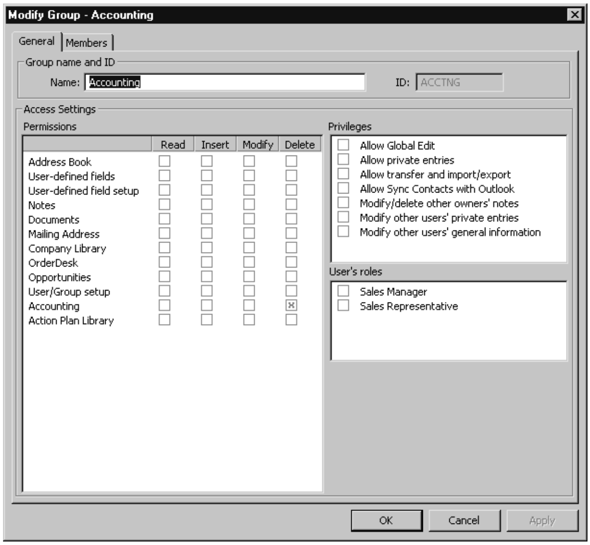
**8** Click **Apply** to save the changes.

# Security Groups

It is important to note that groups have access settings, but they do not have access rights that users do.

A security group is a group of users, usually belonging to a functional group such as a Finance department, who have access to entries related to their group and have specific security Access Settings. A user may be a member of more than one security group.

The Group dialog box is shown below.




## Group Name and ID

Every security group has a name and an ID that identify the group. Changing the name has no effect on the group functionality. However, you cannot change the group ID. If you ever need to recreate these security groups, it is imperative that you use the correct security group IDs (the group name is irrelevant).

## Group Access Settings

A security group has Access Settings that affect the level of access its members have within the Address Book. It is important to note that granting an Access Setting to a group does not necessarily mean that all members of the group will have that Access Right. The level of access each individual user has to the Address Book is controlled by the Access Settings of the user account and the Access Settings of any groups the user belongs to. For more information about user and group Access Settings, refer to “User and Group Security” on page 54.

### Group Members

You can add or remove users from the group in the Members tab of the Group dialog box.

You can also add or remove a user from any groups on the Security Groups tab of the User dialog box.

## Default Security Groups in all New Address Books

Every new Address Book contains several security groups, described in the following table. Only the MASTER user belongs to these groups by default, but you can add additional users to each group.

For more information about security settings related to Crystal Reports, refer to “Access Rights Required to View or Create Crystal Reports” on page 65.

| Security Group Name | Group ID | Enables group members to... |
| --- | --- | --- |
| Accounting | ACCTNG | Restrict accounting transaction notes to members of this group. If an Accounting Link user is not a member of the Accounting security group, notes for any accounting transactions created by that user are Public. However, notes for transactions created by members of the Accounting group are restricted to members of that group. |
| Crystal Reports Users | R_CRU | Create new reports from the Reports > Crystal Reports > Personal > Custom Report menu in Maximizer. Note that the user must also have the Custom Reports access right enabled to be able to create reports. |

# Creating a New Security Group

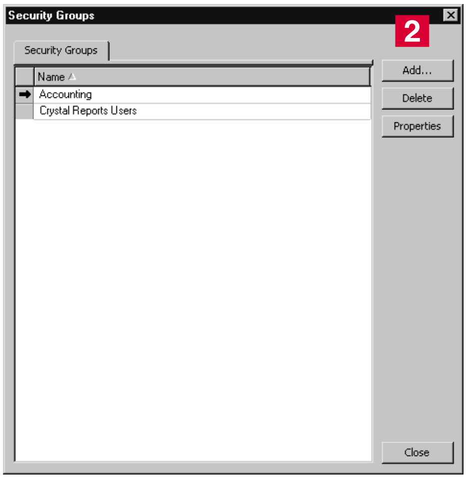
For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to "User and Group Security" on page 54.

For an explanation of each of the access settings, refer to "User Access Rights and User/Group Access Settings" on page 55.

### ➤ To create a new security group and assign members

The File > Security Groups menu item is also available in Maximizer if the logged-in user has Insert rights for User/Group setup.

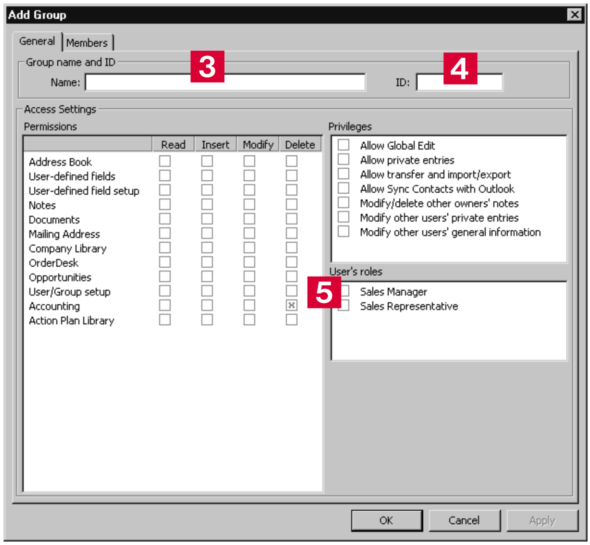
1. Select **File** > **Security Groups**.
2. Click **Add**.




3. Enter a **Group Name**.
4. Enter a unique **Group ID** (up to 9 characters). The first character of the Group ID must be a letter.

5 Assign **Access Settings** to the group.

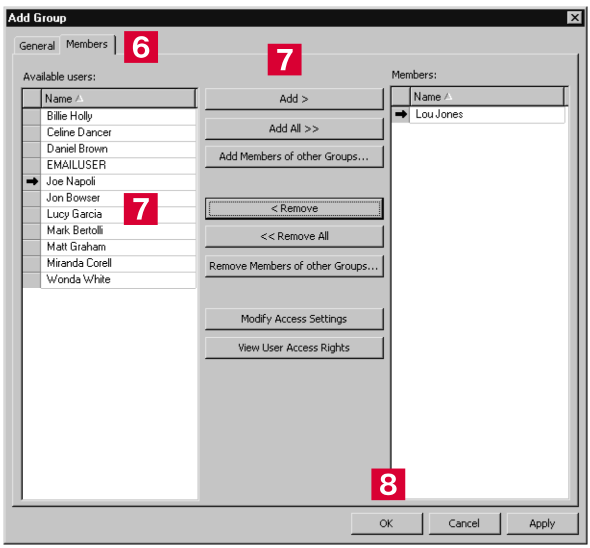
Access Settings for the group affect the Access Rights of all users who are members of the group.



6 Click the **Members** tab.

7 From the **Available Users** list, select a user to add to the security group, and click **Add**. Repeat to add additional users.

To remove a user, select the user from the Members list, and click Remove.



8 Click **OK** to close the Add Group dialog box.

The security group has now been created.

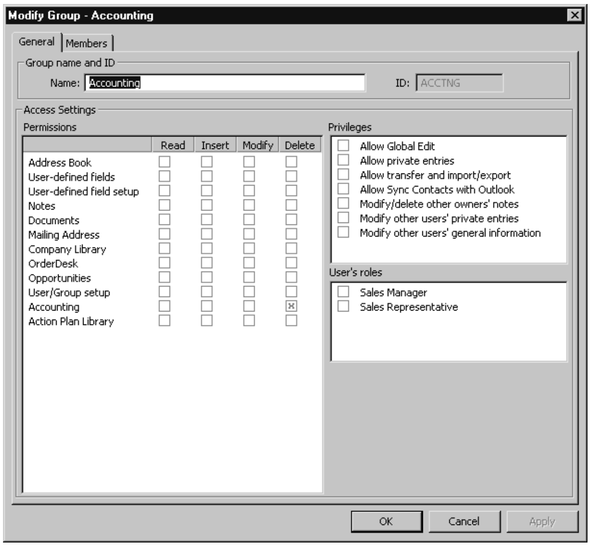
# Modifying Group Access Settings

For an explanation of the relationship between user access rights, user access settings, and group access settings, refer to “User and Group Security” on page 54.

For an explanation of each of the access settings, refer to “User Access Rights and User/Group Access Settings” on page 55.

## ➤ To modify access settings of an existing group

1. Select **File** > **Security Groups**.
2. Select the group name.
3. Click **Properties**.
4. Select the appropriate settings for the group, and click **OK**.
5. Click **Apply** to save the changes.



# Record Ownership

In Maximizer, many entries have an Owner field, or Full Access and Read Access fields. These fields control who can view or edit the entry. Users can access their own private records, all publicly owned records, and private records owned by their group. For example, the user "Alice" of the "Finance" group can view all of her own records, all records owned by the "Finance" group, and all Public records.

Sometimes it's important to allow users to have private entries because some entries aren't meant to be shared with your entire organization. In Maximizer, it's possible to specify Full Access and Read Access to specific users or groups for each entry in the Address Book. In addition to Address Book entries, you can specify ownership of notes, documents, and other types of entries.

When a user creates a new Address Book entry, he or she can designate access for that entry. Full Access or Read Access can be granted to a specific user, a group, or it can be Public.

To be able to use the Owner, Full Access, or Read Access fields, the user must have the "Allow private entries" access right enabled.

| Field | Value | Description |
|---|---|---|
| Owner | Public | All users can view and modify the entry, regardless of their user or group security settings. |
| | User | Only the specified user can view or modify the entry. |
| | Group | Only members of the specified group can view or modify the entry, regardless of their user or group security settings. |
| Full Access | Public | All users can modify the entry, regardless of their user or group security settings.<br>Note that the Read Access field becomes disabled if Full Access is set to Public. |
| | User | Only the specified user can modify the entry. |
| | Group | Only members of the specified group can modify the entry, regardless of their user or group security settings. |
| Read Access | Public | All users can view the entry. |
| | User | Only the specified user can view the entry. |
| | Group | Only members of the specified group can view the entry. |

# Access Rights Required to View or Create Crystal Reports

The following table explains how the Crystal Reports Users security group and the Custom Report access right control whether a user can view or create reports from the Reports > Crystal Reports menu in Maximizer.

| Is the user a member of the Crystal Reports Users security group? | Does the user have the Custom Report access right? | How much access does the user have to the Reports > Crystal Reports menu in Maximizer? |
|---|---|---|
| No | No | The user can see the menu but cannot view or create reports. |
| Yes | No | |
| No | Yes | The user can open existing reports but cannot create new reports. |
| Yes | Yes | The user can open and create reports. |

While the Crystal Reports Users security group and the Custom Report access right control whether a user can view and create reports, the user permissions control the type of information the user can access in those reports. If a user does not have rights to view information for a Maximizer window/module, and the user creates a report related to the window/module, the related information does not appear in the report. For example, if the user has Read permissions to Address Book entries, but not to Opportunities, any reports the user views or creates may contain Address Book information but will not contain Opportunity information.

To enable the user to include the data in the report, ensure that the user has at least Read permission to the window/module. In Administrator, individual user permissions are available through File > Users > [User ID] > Properties > Access Rights. To grant the permission to all members of a group, go to
File > Security Groups > [Group] > Properties.

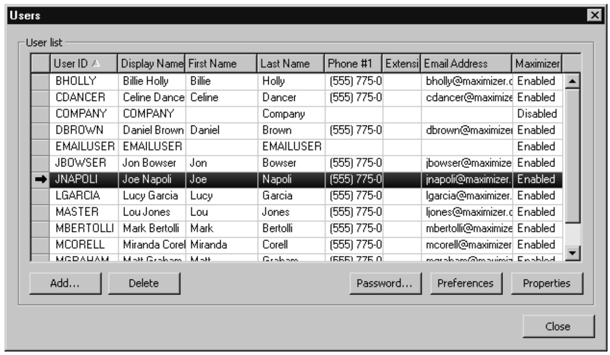
For more information about using Crystal Reports, refer to “Crystal Reports Database Tables Reference” on page 255.

# User Preferences

The Address Book administrator is responsible for setting up initial user preferences in Administrator. However, users can change many of their user preferences in Maximizer.

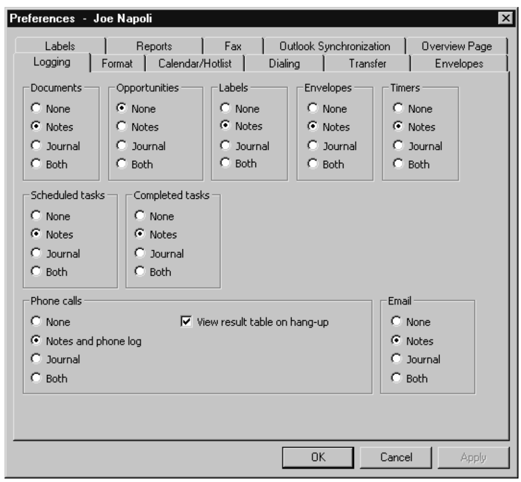
## ➤ To set Address Book user preferences

**1** Select **File** > **Users**, select a user, and click **Preferences**.




For detailed information about the fields on each tab, click inside the tab area, and press F1.

**2** Set the user-related preferences on each of the tabs.



CHAPTER 6

# Configuring an Address Book

## In this chapter...

# Address Book Preferences

You can set Address Book preferences by selecting File > Preferences in Administrator. The following table outlines the settings available on each tab of the Preferences dialog box. For more information about any of these preferences, go to File > Preferences, select a tab, and press F1.

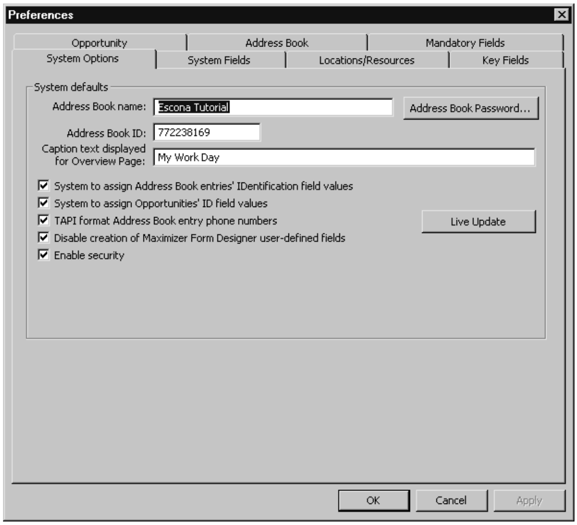
The MASTER user is responsible for devising and implementing ratings schemes and completion reasons in Administrator.

| On this tab... | You can set the following preferences... |
|---|---|
| Address Book | • values available in the Category field for Address Book entries<br>• fields to check for duplication of Address Book entries (refer to "Preventing Duplicate Address Book Entries" on page 70 for more information) |
| Key Fields | • key user-defined fields available on the Basic Information tab of Address Book entries and opportunities (refer to "Creating Key Fields Lists" on page 83 for more information) |
| Location/Resource | • locations available for appointments<br>• resources available for appointments |
| Mandatory Fields | • mandatory or optional data entry requirements for basic fields in Address Book entries and opportunities |
| Opportunity | • opportunity stages and probabilities of close<br>• opportunity confidence ratings<br>• opportunity completion reasons |
| System Fields | • add, modify, and delete values of system fields |
| System Options | • Address Book name<br>• Address Book ID<br>• Address Book password<br>• system-assigned Address Book entry IDs and opportunity IDs<br>• TAPI phone number format<br>• user-defined field creation in Form Designer<br>• Overview page caption<br>• Live Update options |

For detailed information about the fields on each tab, click inside the tab area, and press F1.

### ➤ To set Address Book preferences

1. Select **File** > **Preferences**.
2. Set the Address Book preferences on each of tabs.

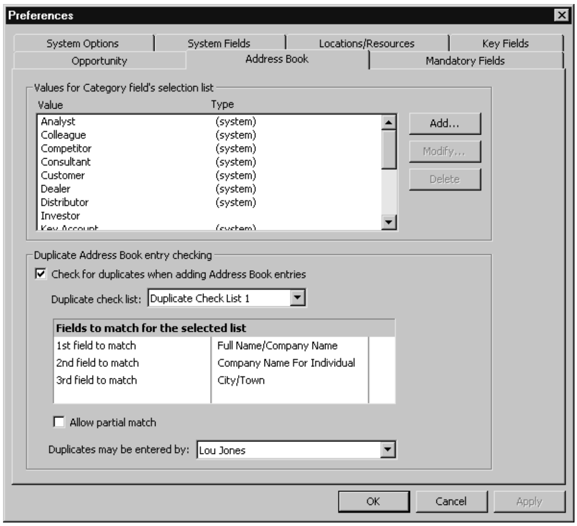


# Preventing Duplicate Address Book Entries

When more than one Address Book entry exists for the same person or organization, the entries are considered duplicates. These duplicates may occur when users create a new Address Book entry without determining whether an entry already exists for the person or organization. They can also occur when entries are created automatically by operations such as importing. Duplicate entries are undesirable because information related to the person or organization becomes fragmented. You can prevent most duplicate entries by using Maximizer's duplicate Address Book entry checking options.

For information about preventing duplicates when importing data, refer to the sections about importing in chapter 12 "Managing Address Book Data" on page 203.

You can configure duplicate checking in Administrator (File > Preferences > Address Book tab).




By default, duplicate checking is turned off, so you must enable it before you can use it in your Address Book.

## How Duplicate Checking Works

Administrator enables you to prevent most duplicate Address Book entries by specifying up to three combinations of fields that must be unique to each entry. If a user attempts to create a new Address Book entry,  and the values of any of those field combinations match an existing entry, Maximizer does not allow the duplicate entry to be created.

A combination of fields that must be unique to each entry is called a "duplicate check list". You can create up to three duplicate check lists, using up to three fields in each list.

Maximizer considers an entry to be a duplicate if the values of all fields from List 1, or all fields from List 2, or all fields from List 3 match an existing entry.

| List 1 | | List 2 | | List 3 |
|---|---|---|---|---|
| 1st Field | OR | 1st Field | OR | 1st Field |
| AND | | AND | | AND |
| 2nd Field | | 2nd Field | | 2nd Field |
| AND | | AND | | AND |
| 3rd Field | | 3rd Field | | 3rd Field |

The "Full Name/Company Name" matching field checks the Full Name of Individual or Contact entries and checks the Company field of Company entries. The "Company for Individual" matching field checks the Company field of Individual entries.

The default duplicate check lists, described below, effectively prevent most duplicate entries:

| | |
|---|---|
| **Duplicate Check List 1:** | 1. Full Name/Company Name |
| | 2. Phone 1 |
| | 3. None |
| **Duplicate Check List 2:** | 1. Full Name/Company Name |
| | 2. Zip/Postal |
| | 3. None |
| **Duplicate Check List 3:** | 1. None |
| | 2. None |
| | 3. None |

When a user creates a new Address Book entry in Maximizer, and Maximizer detects it as a potential duplicate Address Book entry, the user is presented with the following list of options:

- **Merge with selected entry:** The newly created or modified Address Book entry merges with, and overwrites, the existing (selected) entry.
- **Edit selected entry:** The existing (selected) Address Book entry opens, allowing it to be edited by the user. Any information entered in the newly created entry that was detected as a duplicate must be re-entered.
- **Add the new entry:** This option adds the new entry. It is available only under certain circumstances. If a user or group has permission to create duplicate entries ("Duplicates may be entered by" field in the Address Book tab), he or she has the option to create duplicate entries. This option is also available if partial matching is enabled and Maximizer finds a partial match.

## Partial Matching

Partial matching identifies an entry as a possible duplicate even if not all fields in any of the duplicate check lists are the same in both the new entry and an existing entry.

With partial matching, the order of the fields (1st, 2nd, 3rd) in the duplicate check lists is important, as described in the following scenarios:

If the first field only is defined in the list (the second and third fields are set to None), partial matching doesn't apply because matching one field is a complete match.

- If the first and second fields only are defined in the list (the third field is set to None), an entry is considered a possible duplicate if only the first field matches.
- If all three fields are defined in the list, an entry is considered a possible duplicate if only the first field matches, or if both the first and second field match.

If the first field doesn't match, an entry is never considered a possible match, even if the second and/or third field matches.

Maximizer displays the list of possible duplicates in order of number of fields matched.

| List 1 | OR | List 2 | OR | List 3 |
|---|---|---|---|---|
| 1st Field<br>OR<br>1st & 2nd Field | | 1st Field<br>OR<br>1st & 2nd Field | | 1st Field<br>OR<br>1st & 2nd Field |

If the Address Book has been upgraded from a previous version of Maximizer, and duplicate checking was enabled, partial matching is enabled after upgrading the Address Book to the new version.

By default, partial matching is disabled. To turn partial matching on, select the "Allow partial match" checkbox.

The "Allow partial match" checkbox applies to all Duplicate Check Lists. You cannot allow partial matches for some lists and not for others.

Partial matching is relevant only if no exact matches exist. If all the fields in any of the duplicate check lists match an existing entry, it is considered a duplicate entry, and partial matching does not apply. However, if Maximizer finds no exact matches, it returns a list of entries matching any of the fields from the duplicate check lists.

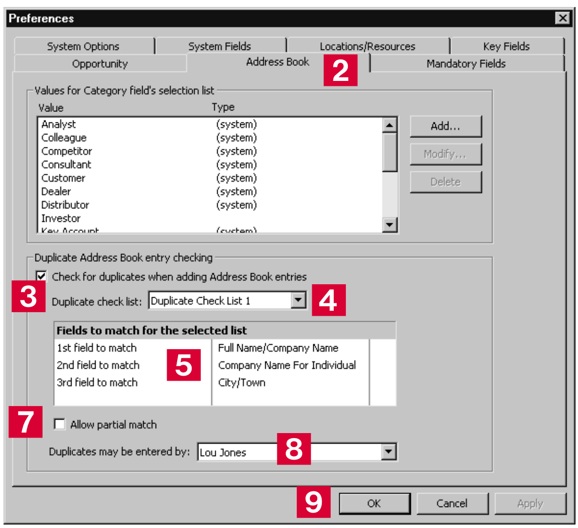
## Permission to Create Duplicate Entries

If some users or groups require the ability to create duplicate Address Book entries, you can select a user or group from the "Duplicates may be entered by" drop-down list. If more than one user requires this ability, add those users to a new security group and then select that group from this drop-down list. In Maximizer's Duplicate Address Book Entry Found dialog box, the user(s) can then choose the "Add the new entry" option.

# Configuring Duplicate Address Book Entry Checking

### ➤ To configure duplicate Address Book entry checking

1. In Administrator, select **File** > **Preferences**.
2. Click the **Address Book** tab.
3. Select the **Check for duplicates when adding Address Book entries** checkbox.
4. From the **Duplicate check list** field, select one of the Duplicate Check Lists.
5. In the **Fields to match for the selected list** box, select the first, second, and third field to match. (You can select up to three fields, but selecting all three fields is not required.)
6. Repeat the previous two steps to configure any of the other Duplicate Check Lists.
7. To enable partial matching, select the **Allow partial match** checkbox.
8. If you want any users or groups to be able to create duplicate entries, select the name of the user or group from the **Duplicates may be entered by** drop-down list.
9. Click **Apply**, and then click **OK**.



# Setting up User-Defined Fields for an Address Book

Although the information you can record in Maximizer covers the basics, you probably want to record additional information, such as budgets, income, interests, number of employees, or other data. You can record this information in Maximizer with user-defined fields, which are custom fields for storing information in any of the following categories:

User-defined fields can be created and modified in both Administrator and Maximizer (if users have the necessary rights) using the File > Set Up User-Defined Fields menu item.

- **Address Book entries**: Available in the Address Book window
- **Opportunities**: Available in the Opportunities window of Maximizer
- **User accounts**: Available in the user properties dialog box

Once you have created a user-defined field, users can enter data in that field.

## Types of User-Defined Fields

There are four different types of user-defined fields. Each type has different properties and uses.

- **Table user-defined fields** enable you to select a value or values from a list. This type of field is very useful for multiple choice or multiple value fields. If you create a table user-defined field with the “single value only” attribute, no more than one value can be selected from the list, which is particularly useful for fields where it wouldn't make sense to select more than one value.
- **Date user-defined fields** can store a specific date or an annually recurring date.
- **Alphanumeric user-defined fields** record any alphanumeric text (letters and numbers) up to a maximum number of characters that you specify. Alphanumeric fields can be encrypted for security protection, though encrypted fields cannot be transferred between Address Books. You cannot disable or enable encryption once you have created the field.
- **Numeric user-defined fields** record any numeric value you wish to keep for the Address Book entries. If you specify a number of decimal places for the user-defined field, you can use this field type for monetary amounts.

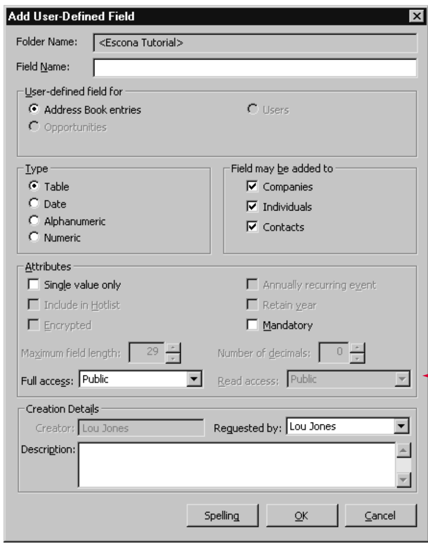
# User Access Rights for User-Defined Fields

As the Address Book administrator, you are responsible for creating user-defined fields in Administrator for Maximizer users. However, you can give any user the ability to create, change, or delete user-defined fields in Maximizer by enabling the following access rights in Administrator (File > Users > [user] > Properties > Access Rights):

- The **User-defined fields** access right enables the user to assign values to user-defined fields, but not create fields.
- The **User-defined field setup** access right enables the user to create new user-defined fields.

For information about assigning user access rights, refer to “User and Group Security” on page 54.

You can also restrict user access to a specific user-defined field. The user-defined field properties has options for Full Access (read and write) and Read Access (read-only) permissions.



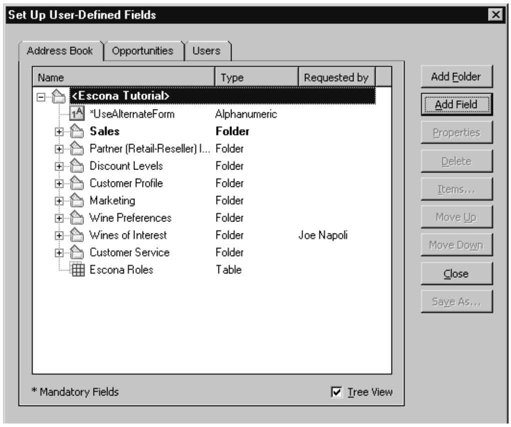

**Full Access and Read Access permissions.**

The Full Access and Read Access fields contain a drop-down list of users, groups, and Public. Select which user(s) the Full Access or Read Access permission applies to:

- **Public** assigns the user-defined field access permission to all users
- **[user]** assigns the user-defined field access permission to an individual user
- **[security group]** assigns the user-defined field access permission to all members of a security group

# About the Set Up User-Defined Fields Dialog Box

User-defined fields are created and modified through the Set Up User-Defined Fields dialog box, which is available from the File menu in both Maximizer and Administrator.




The dialog box contains tabs for each category of user-defined field. The user-defined field structure can also be multi-tiered with multiple levels of user-defined field folders, each of which may contain other folders or user-defined fields. The folder structure may contain a maximum of three folder levels.

## Mandatory User-Defined Fields and System Fields

Key fields are specified on the Key Fields preferences tab in Administrator. (File > Preferences > Key Fields)

Some user-defined fields are displayed in bold or with an asterisk:

- **Mandatory** user-defined fields are denoted with an asterisk displayed after the field type.
- **System** fields are shown in bold, black text.

## Sort order

There are two methods of changing the order of fields and folders:

- **Drag and drop**: You can use the mouse to drag and drop fields or folders to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.
- **Move Up and Move Down buttons**: Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons only move items within their current folder level. You cannot use them to move items in or out of folders.

# Creating a New Folder for User-Defined Fields

Use the Set Up User-Defined Fields dialog box to create new user-defined fields and folders for use with Address Book entries, opportunities, and user accounts. This dialog box is available from the File menu in both Administrator and Maximizer, although users can create user-defined fields in Maximizer only if the **User-defined field setup** access right is granted in their user account.

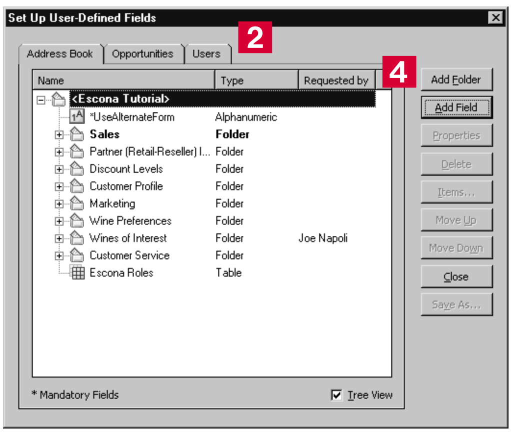
You can group similar user-defined fields into folders and sub-folders to a maximum folder depth of 3 levels. Grouping user-defined fields into folders is particularly useful if you have a large number of user-defined fields. Grouping them makes them easier to find and reduces the amount of scrolling needed to find the one you're looking for.

## ➤ To create a new folder

1. Open the Set Up User-Defined Fields dialog box (**File** > **Set Up User-Defined Fields**).
2. Select the tab for the category of user-defined field to create.
3. To create a top-level folder, select the Address Book name at the top of the list.

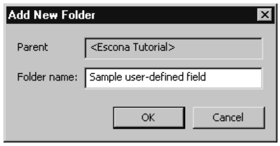
   – or –

   To create a folder within an existing folder, select the existing folder.
4. Click the **Add Folder** button.



User-defined field and folder names cannot contain forward slash or backward slash characters ( / \ ).

5. Enter a name for the new folder, and click **OK**.




The new folder now appears in the Set Up User-Defined Fields dialog box.

6. Move the new folder to a different position in the list, if desired.

## Creating a New User-Defined Field

Create user-defined fields for Address Book entries, opportunities, and user accounts in the Set Up User-Defined Fields dialog box. This dialog box is available from the File menu in both Administrator and Maximizer, although users can create user-defined fields in Maximizer only if the **User-defined field setup** access right is granted in their user account.

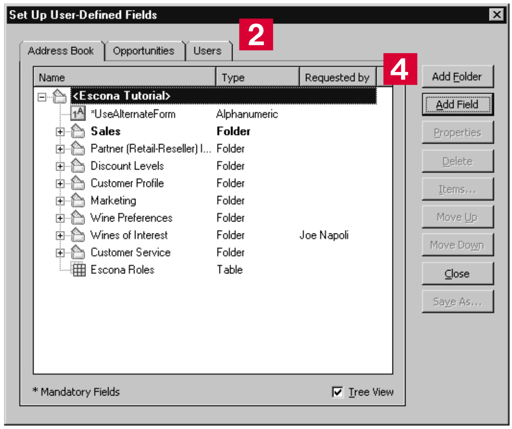
### ➤ To create a new user-defined field

1. Open the Set Up User-Defined Fields dialog box (**File** > **Set Up User-Defined Fields**).
2. Select the tab for the category of user-defined field to create.
3. Select an existing folder, inside which to create a new field.

   – or –

   Select a user-defined field. The new field will be created at the same level as the selected user-defined field.

**4** Click the **Add Field** button.




User-defined field and folder names cannot contain forward slash or backward slash characters ( / \ ).

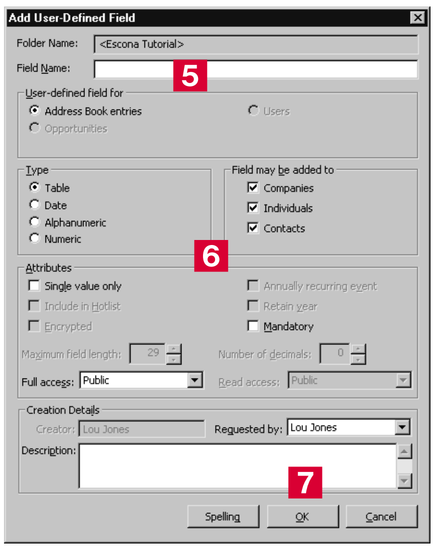
**5** In the **Field Name** field, type a name for the user-defined field.

**6** Specify the properties of the user-defined field.

For detailed information about each of the property fields, click inside the dialog box and press **F1**.

**7** Click **OK**.

You have now created a user-defined field.




**8** Move the new field to a different position in the list, if desired.

# Adding Items to a Table User-Defined Field

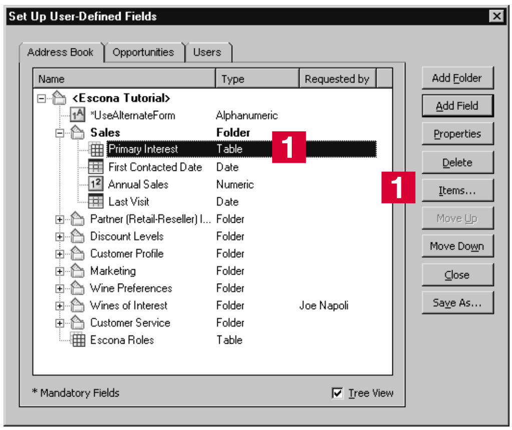
Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new user-defined field of this type, you should add the items to the table. However, while using the user-defined field in Maximizer, users may find a need to add an item to the list. A user can add items to a table user-defined field on-the-fly if the user account has sufficient privileges. Both procedures are explained below.

## ➤ To add items to a Table user-defined field

**1** In the Set Up User-Defined Fields dialog box, select the table-type user-defined field, and click the **Items** button.

– or –

Double-click the table user-defined field.

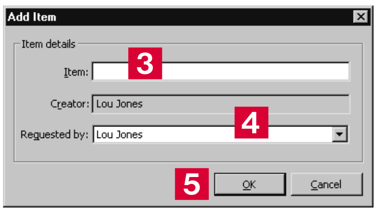


2 In the Set Up Items dialog box, click **Add**.


3 Type a name for the item.

4 In the **Requested by** field, select the name of the user who requested the item creation.

5 Click **OK**.




6 Repeat these steps to add any additional items to the Table user-defined field.

# Transferring User-Defined Fields between Address Books

Encrypted user-defined fields cannot be transferred between Address Books.

### ➤ To transfer user-defined fields between Address Books

1. In Maximizer, select **File** > **Transfer** > **User-Defined Fields**.
2. In the Transfer User-Defined Fields dialog box, select the user-defined fields to transfer.
3. Click the **Transfer** button.
4. To copy the data into a target Address Book that is accessible from the computer, select the **Direct Address Book access** transfer method. Accessible Address Books are listed in **Available target Address Books**.

   – or –

   If the target Address Book is not listed, select the **Email** transfer method. The data is compressed into a .MET file and attached to an email message.
5. If you selected **Direct Address Book access**, select the target Address Book, click **OK**, and log on to the Address Book. Maximizer transfers the user-defined fields and notifies you when the transfer is complete.

   – or –

   If you selected **Email**, click **OK**. Maximizer creates an email message with the user-defined fields attached in a .MET file. Type an email address in the **To** field, and click **Send**.

# Creating Key Fields Lists

Assigning a user-defined field to a Key Fields list does not remove it from the User-Defined Fields tab. Those fields appear in both tabs.

Key Fields are important user-defined fields that are highlighted on the Basic Information tab in Maximizer Address Book entries and opportunities, making them more readily accessible. Which user-defined fields appear as Key Fields is up to you. You might select mandatory user-defined fields as Key Fields, so users don't miss them when creating a new record. You might also select frequently used user-defined fields, making it easier for users to quickly enter these values. And you might select user-defined fields important to a particular group of users because different Key Field lists can be defined for a specific user or group, or for all users.

## Specifying Key Fields by Entry Type

When you create a Key Fields list in Maximizer, you can specify up to eight user-defined fields for each entry type. The entry types are described in the table below.

The user-defined fields available for each entry type correspond to the related type of user-defined field and the related Maximizer entries. For example, within a Key Fields list, the Opportunity Key Fields entry type may contain only opportunity user-defined fields, and these Key Fields will be available only in the Opportunity dialog box in Maximizer.

There are three types of Address Book entry key fields: Companies, Individuals, and Contacts. Only user-defined fields for the type of Address Book entry (Company, Individual, or Contact) are available for each Key Fields entry type. For example, only user-defined fields that are available for Contact Address Book entries will be available for Contact Key Fields entry types.

| Key Fields Entry Type | Type of User-Defined Field | Visible in Maximizer Entry Type |
|---|---|---|
| Company | Address Book entry user-defined fields for Companies | Companies |
| Individual | Address Book entry user-defined fields for Individuals | Individuals |
| Contact | Address Book entry user-defined fields for Contacts | Contacts |
| Opportunity | Opportunity user-defined fields | Opportunities |

# Restricting Key Fields to Specific Users

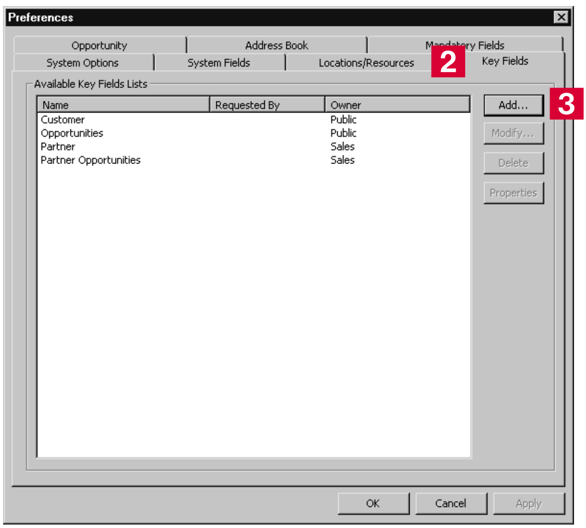
The Key Fields in the Basic Information tab of Maximizer entries are visible only to the user(s) that the Key Field list is assigned to. However, other users may still be able to access the field through the User-Defined Fields tab, depending on which users or groups the user-defined field is assigned to. Assigning a user-defined field to a Key Fields list does not determine who can access the user-defined field. It only determines who can access the field from the Key Fields list. Users can see all the Key Fields from public Key Field lists, personal Key Fields lists, and Key Fields lists for any security groups a user belongs to.

# Creating a Key Fields List

Create Key Fields lists in Administrator, as described in the following procedure.

### ➤ To create a Key Fields List

1. In Administrator, select **File** > **Preferences**.
2. Select the **Key Fields** tab.




3. Click **Add** to open the Add Key Fields dialog box.
4. In the **List name** field, create a name for the Key Fields list.
5. From the **Assigned to** drop-down list, select a user or security group to assign the Key Field list to, or leave it as Public.

ⓘ The Assigned To field determines which users will see these fields in their Key Fields list in Maximizer.

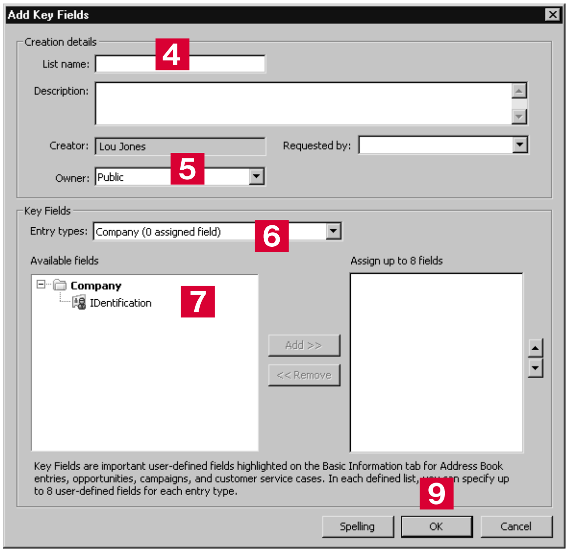
6 From the **Entry types** drop-down list, select the type of Maximizer entry to assign Key Fields to.

The fields for that module appear in the Available Fields list.

7 Add up to eight user-defined fields to the Key Fields list by selecting each field and clicking **Add**.

8 Repeat steps 6 and 7 to add Key Fields for other modules.

9 Click **OK** to save the list.



# Recording Holidays in the Holiday Editor

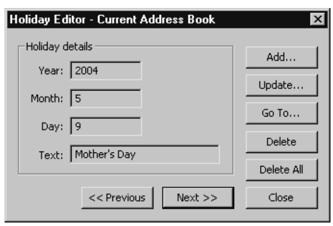
The Holiday Editor is a utility you can use to add or edit holidays in the Maximizer calendar. By default, the Holiday Editor contains many North American holidays. The holidays listed in the Holiday Editor also appear in the Calendar window in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

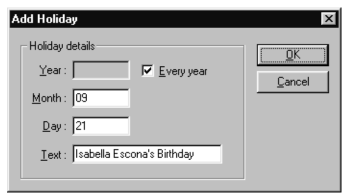
If you wish to add personal holidays or events to your calendar, such as "Alice's birthday", you must create a yearly recurring appointment using the Calendar window in Maximizer.

The Holiday Editor's data file—Mxzhol.nam—is inserted in the Maximizer program folder when you install Maximizer. In this location, you use Administrator's Holiday Editor to manage one set of holidays for your installation of Maximizer.

### ➤ To add a holiday to your calendar

1. Select **Utilities** > **Holiday Editor**.
2. Click **Add**.
3. Enter the details of the new holiday.
4. Click **OK** to close the Add Holiday dialog box.




### ➤ To share your holidays with another Maximizer workstation

- Copy the **Mxzhol.nam** file from your Maximizer program folder to the program folder on the other computer.

  Note that this replaces any existing holidays on the destination computer with your own.

CHAPTER 7

# Configuring Maximizer for Email, Fax, and Phone

## In this chapter...

# Setting Up Maximizer to Use Email

The Email window in Maximizer provides you with the ability to send and receive email within Maximizer. The Email window works with your existing email system so that you can take advantage of some of the benefits of sending and receiving email. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily.

Maximizer's Email window works much the same as any Extended MAPI email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email.

## Supported Email Clients

To use these features, you must already have a Messaging Application Programming Interface (MAPI) or VIM (Vendor Independent Messaging) email client. Email clients that should work with Maximizer when properly configured include those listed below:

- Lotus cc:Mail
- Lotus Mail
- Lotus Notes
- Microsoft Exchange Sever
- Microsoft Outlook/Microsoft Outlook Express
- Microsoft Windows Messaging
- Novell GroupWise

Please see the Maximizer website at www.maximizer.com for the latest version information of compatible email programs.

## Configuring Maximizer for Novell GroupWise and Lotus cc:Mail/Mail

If you are using Novell GroupWise, Lotus cc:Mail (MAPI), or Lotus Mail (MAPI), select the corresponding option in Maximizer's Advanced Email Preferences (File > Preferences > Email tab). If you do not select the correct option, a program fault error will occur when using the Email window. For Lotus cc:Mail and Lotus Mail, you also must have the "Override Extended MAPI" option selected in the File > Preferences > Email tab.

## Configuring Maximizer for Microsoft Exchange

If you are using a version of Microsoft Exchange prior to 5.0 and you have the “Read messages using email service provider's editor” option selected in Email Preferences, the Reply, Reply All, Forward, Previous and Next buttons will not work when you open a message in the Maximizer Email window. Upgrading to Microsoft Exchange 5.0 or higher fixes this problem.

## Configuring Maximizer for Microsoft Outlook Express

Because Outlook Express is a Simple MAPI program, the Maximizer Email window shows the contents of the Outlook Express Inbox only. To use Outlook Express with Maximizer, you must configure settings in both Maximizer and Outlook Express, as described in the following procedures.

### ➤ Step 1: To Configure Maximizer for Outlook Express 6.x

1. Start Maximizer. If necessary, open the **Address Book** you use.
2. Select **File** > **Preferences**.
3. Select the **Email** tab.
4. Enable the **Override extended MAPI** option.
5. Click **Advanced**.
6. Select **Other email system** and click **OK**.
7. Click **OK** to close the Preferences window.
8. Close Maximizer.

### ➤ Step 2: To Configure Outlook Express 6.x for Maximizer

1. Start Outlook Express.
2. Select **Tools** > **Options**.
3. On the General tab, click the **Make Default** button beside **This application is NOT the default Mail handler**.

   If the button is unavailable, and the option says **This application is the default Mail handler**, then you can proceed to the next step because Outlook Express is already the default Mail handler.

4. Click **Apply**, and then click **OK**.

   Windows may prompt you to restart your computer.

   Maximizer is now integrated with Outlook Express.

## Configuring Maximizer for Microsoft Outlook

Maximizer cannot use Extended MAPI with the Internet Mail Only installation type. Ensure the installation type is Corporate or Workgroup.

Microsoft Outlook is an Extended MAPI program, which means the Maximizer Email window will display the Outlook folders.

### ➤ To use Outlook with Maximizer

1. In Maximizer, select **File** > **Preferences**.
2. Select the **Email** tab.
3. Find the **Override Extended MAPI** option and verify this setting is disabled (the checkbox should be cleared).
4. Click **Apply**, and then click **OK**.
5. Exit Maximizer.
6. Restart Maximizer.

When you select the Email window (Window > Email), it displays Outlook folders such as Inbox, Outbox, Sent Items, Deleted Items, and your personal folders.

For more information on configuring Maximizer for Outlook Synchronization, refer to "Configuring Microsoft Outlook Synchronization" on page 91 and the Maximizer and Administrator online help (Help > Contents) and F1 Help.

# Configuring Microsoft Outlook Synchronization

Outlook Synchronization works with Microsoft Outlook only, not Microsoft Outlook Express.

Outlook Synchronization mirrors selected calendar appointments and Address Book entries between Maximizer and Microsoft Outlook to ensure the entries exist in both programs and that they both contain the same information.

Outlook Synchronization settings are configured on a per-user basis, and each Maximizer user has one set of configuration settings, regardless of machine name or Windows username. Typically, users configure their own Outlook Synchronization settings through File > Preferences in Maximizer. However, you can also configure their settings through Administrator's user preferences.

Outlook Synchronization preferences enable you to select which entries will be synchronized:

- For appointments, only entries scheduled within the specified date ranges will synchronize. These settings apply to appointments in both Maximizer and Outlook.
- For Maximizer Address Book entries, only the entries belonging to the selected Favorite List will synchronize with Outlook. Those entries will be assigned to the specified Outlook category.
- For Outlook contacts, only the contacts assigned to the specified category will synchronize with Maximizer. Those entries will be assigned to the selected Favorite List in Maximizer.

Outlook Synchronization preferences also enable you to specify how often to synchronize and how to handle conflicts when the same entry has been modified in both Outlook and Maximizer.

The same preferences are available through File > Preferences > Outlook Synchronization in Maximizer.

Maximizer can synchronize only with Outlook profiles on the same machine. When configuring a user's Outlook Synchronization settings through Administrator, you must manually enter the Outlook profile name, but it cannot be verified until the Outlook Synchronization process runs on the user's machine. If you don't know the Outlook profile name, leave the field blank and the user can select it through Maximizer's user preferences. When Outlook Synchronization runs, it checks that the configuration has a valid Outlook profile name. If not, Outlook Synchronization logs the error.

## Recurring Appointments

Recurring appointments in Microsoft Outlook synchronize to Maximizer as recurring appointments unless they have no end date. If the recurring appointment has no end date, only the first occurrence synchronizes with Maximizer, not the recurrences. To synchronize recurring appointments with Maximizer, always provide an end date.

Note that while it is possible to modify the Private property of a single instance of a private appointment in Maximizer, this property can be changed only for the entire series of recurring appointments in Outlook. Therefore, if you change the Private property of a single instance of a recurring appointment in Maximizer, this change will not be synchronized to Outlook.

When using Outlook Synchronization, group appointments in Maximizer synchronize to Outlook for the current user only. However, the synchronized appointment in Outlook includes all the locations, resources, and attendees information in the appointment notes.

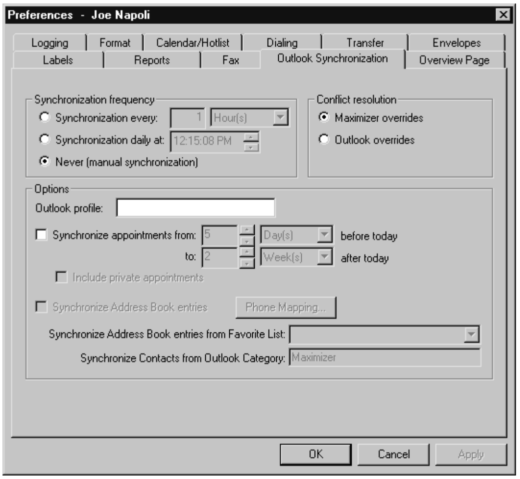
## Synchronization from Outlook to Your PDA

In addition to synchronizing Maximizer data with Outlook, you can synchronize information from Outlook to your PDA. There are several selections of available software to perform this synchronization. Please consult with your PDA manufacturer or supplier for more information.

# Configuring Outlook Synchronization

## ➤ To configure Outlook Synchronization

1. In Administrator, select **File** > **Users**.
2. Select the **User ID** and click **Preferences**.
3. Click the **Outlook Synchronization** tab.




4. In the **Synchronization frequency** group box, specify how often Maximizer should synchronize with Outlook.

   If you select **Never (manual synchronization)**, the user must synchronize manually by clicking the Synchronize with Outlook toolbar button or selecting **Tools** > **Synchronize with Outlook** from the menu bar in Maximizer.

5. In the **Conflict resolution** group box, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.
6. In the **Outlook profile** field, enter the name of the user's Outlook profile. This information must be obtained from the user's computer.
7. To synchronize appointments, select the **Synchronize appointments** checkbox and specify the date range of appointments to synchronize.

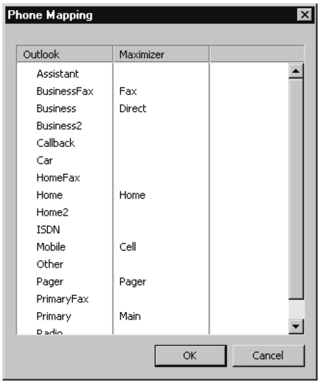
   Private appointments will not be synchronized unless the **Include private appointments** checkbox is also selected.

ⓘ For detailed information about Outlook Synchronization preferences, click inside the dialog box, and press **F1**.

The Synchronize Address Book entries checkbox is disabled if the user does not have the "Allow Sync Contacts with Outlook" access right.

8 To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox.

9 To specify the mapping between Outlook phone number fields and Maximizer phone number fields, click the **Phone Mapping** button, select the Maximizer phone number field to map to each Outlook phone number field, and click **OK**.




Do not map all Outlook phone number fields. Maximizer supports only four phone numbers for each Address Book entry. If an Outlook contact has more than four phone numbers, and more than four types are mapped between Outlook and Maximizer, not all the Outlook phone numbers can be synchronized with Maximizer.

10 In the **Synchronize Address Book entries from Favorite List** drop-down list, select the Maximizer Favorite List to synchronize.

11 In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

12 Click **OK**.

# Using Fax Software with Maximizer

Visit the Maximizer website at www.maximizer.com to obtain an updated list of supported fax applications.

You can set up Maximizer for faxing anytime after you have installed the fax modem and fax application.

To fax any document with WinFax Pro, simply select the fax driver in place of a printer when you print the document. The Maximizer Word Processor also supports merging directly to faxing software, which enables you to perform broadcast faxing.

## Third-party Faxing Configuration

In order for third-party fax drivers to function with Maximizer, the following properties must be configured correctly:

- correct registry settings for the FAXDDE key
- fax application path

## FAXDDE Registry Key Settings

The FAXDDE registry key of the Maximizer Word Processor (Maximizer Editor) must have the following keys filled in:

- Application
- Fax Driver
- Topic

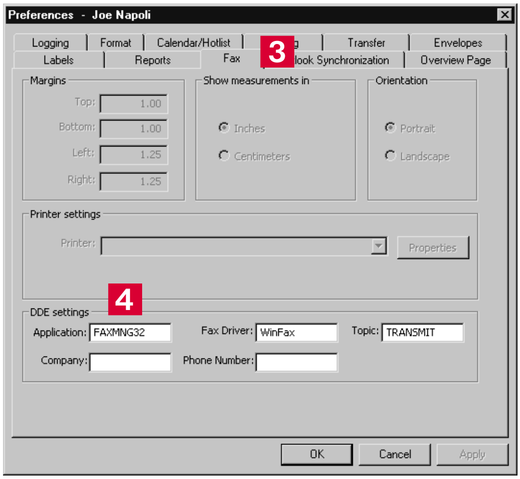
The following table shows the FAXDDE values for WinFax.

| **Value Name** | **Value Data** |
|---|---|
| Application | FAXMNG32 |
| Fax Driver | WinFax |
| Topic | TRANSMIT |

Maximizer uses the WinFax FAXDDE values as the default configuration. If you are using a fax driver other than WinFax, refer to the fax documentation for the corresponding FAXDDE values and update the values in the registry.

## ➤ To update the FAXDDE registry keys

1. In Administrator, select **File** > **Users**.
2. In the Users dialog box, click **Preferences**. (You can select any user.)
3. Click the **Fax** tab.
4. In the DDE settings fields at the bottom of the tab, enter the FAXDDE values for your fax driver.




5. Click **Apply**, and then click **OK** and **Close** to exit the User Setup dialog box.

   The FAXDDE values have now been updated in the registry.

## Setting the Fax Application Path

To ensure the correct path to WinFax Control Center (FAXMNG32.EXE) can be found by Maximizer, you must add the full path of the FAXMNG32.EXE to PATH environment variable.

### ➤ To set the WinFax Application Path for Windows 2000

1. Identify the path for **FAXMNG32.EXE**.

   For example:

   “C:\Program Files\Symantec\WinFax”

2. In the Windows Control Panel, double-click the **System** icon to open the System Properties dialog box.
3. Select the **Advanced** tab, and click **Environment Variable**.
4. Locate the **PATH** variable (in the System Variable section) and add the full path you identified in step 1 to the existing value.
5. Close the dialog box and restart the computer.

# Enabling TAPI with Maximizer

You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab).

For more information, refer to your TAPI system and Windows documentation.

Maximizer can use TAPI (Telephony Application Programming Interface) to detect incoming phone numbers (using Caller ID) and to log the phone conversation for the matching Address Book entry.

The following requirements must be met to use TAPI with Maximizer:

- Your telephone system must be TAPI-enabled.
- Your computer's modem must be compatible with TAPI.
- You must install your TAPI driver on your computer.
- Maximizer must be configured for TAPI, as described in this section.

## Requirements for Caller ID

Specific requirements are essential to implement Caller ID detection:

- Caller ID service from the local telephone company
- TAPI-compliant hardware that is Caller-ID capable
- A TAPI component (such as an .INF file driver) for your Caller-ID enabled TAPI hardware (e.g., UniModemV)
- Microsoft TAPI software components

Even if you meet these requirements, caller ID may not operate properly, especially if your local telephone company uses a different standard for caller ID than your TAPI driver. Contact your local phone company to obtain more information regarding your caller ID standard and compare it to the standard used by the TAPI driver.

### Reasons why caller ID may not work

If you use a TAPI-enabled modem (as opposed to a PBX, H.323, or other TAPI hardware), and your telephone company provide MESG-format caller ID information (rather than SDM, another common format), caller ID call detection is unlikely to work.

Microsoft's UniModemV TAPI driver and MODEM.INF file, provided with most TAPI modems, do not support MESG caller ID format, which means your modem (and Maximizer) may never receive caller ID information from TAPI. If your modem manufacturer provides its own TAPI modem or PBX driver and the appropriate INF file, or you are able to obtain SDM-format caller ID, you might have more success.

# Phone Number Matching with TAPI

When Maximizer uses TAPI to detect an incoming phone call, it matches the phone call to a Maximizer Address Book entry and logs the call as a note for the entry. Depending on your TAPI configuration in Maximizer, it uses either the “Smart Phone Number Matching” or “Exact Phone Number Matching” algorithm to determine which Address Book entry matches the incoming phone number.

## Smart Phone Number Matching

By default, Maximizer uses the Smart Phone Number Matching algorithm to determine which Address Book entry matches the incoming call.

When a call comes in, Smart Phone Number Matching looks for all Address Book entries with phone numbers ending with the incoming phone number string and displays those Address Book entries in a list so you can select the correct entry.

For example, if the incoming phone number string is four digits, Maximizer displays a list of all Address Book entries ending in those four digits.

Smart Phone Number Matching matches the digits from right to left. The number of matched digits required for matching is equal to the shorter length of the two phone numbers.

The following table illustrates Smart Phone Number Matching for four-digit and seven-digit incoming phone numbers.

| Address Book entry phone number | Does the incoming four-digit phone number (2314) match? | Does the incoming seven-digit phone number (732-2314) match? |
|---|---|---|
| 9-604-732-2314 | **Yes** | **Yes** |
| 1-604-732-2314 | **Yes** | **Yes** |
| 403-732-2314 | **Yes** | **Yes** |
| 732-2314 | **Yes** | **Yes** |
| 497-2314 | **Yes** | No |
| 2314 | **Yes** | **Yes** |
| 3514 | No | No |
| 14 | **Yes** | **Yes** |

## Exact Phone Number Matching

If you select the "Enable exact number matching" checkbox in the TAPI preferences in Maximizer, it uses the Exact Phone Number Matching algorithm instead of Smart Phone Number Matching.

Exact Phone Number Matching considers an Address Book entry to match the incoming call only if both numbers contain exactly the same phone number with the specified number of digits.

By default, Exact Number Matching requires both phone numbers to be seven digits, but you can change the required number of digits.

The advantage of Exact Phone Number Matching is that when Maximizer finds an Address Book entry that matches exactly, you do not need to select it from a list of possible matches, as you do with Smart Phone Number Matching.

The following table illustrates Exact Phone Number Matching for four-digit and seven-digit incoming phone numbers.

| Address Book entry phone number | Does the incoming four-digit phone number (2314) match? | Does the incoming seven-digit phone number (732-2314) match? |
|---|---|---|
| 9-604-732-2314 | No | No |
| 1-604-732-2314 | No | No |
| 403-732-2314 | No | No |
| 732-2314 | No | **Yes** |
| 497-2314 | No | No |
| 2314 | **Yes** | No |
| 3514 | No | No |
| 14 | No | No |

For instructions on enabling and configuring Exact Phone Number Matching, refer to "Configuring Maximizer to Use TAPI" on page 101.

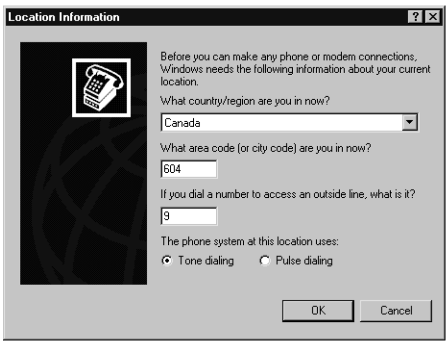
# Configuring Maximizer to Use TAPI

Before you can configure Maximizer to use TAPI, you must have a TAPI-enabled telephone system, and your computer's modem must be configured to use TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

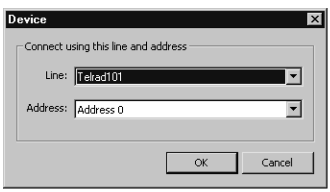
To configure TAPI from Maximizer, select File > Preferences, and click the Dialing tab.

### ➤ To configure Maximizer to use TAPI

1. In Administrator, select **File** > **Users**.
2. Select the user for whom to enable TAPI, and click **Preferences**.
3. Click the **Dialing** tab.
4. In the Method group box, select the **TAPI** option
5. Click **Properties**.
6. Fill in your location information, and click **OK** twice to return to the Maximizer Dialing Preferences.

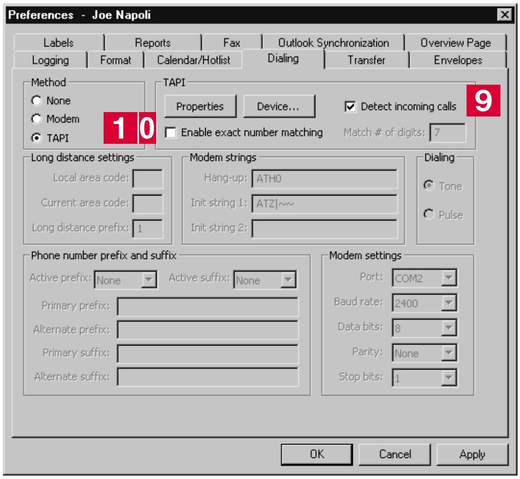



7. Click **Device**.
8. Select your TAPI device name from the **Line** drop-down list, and click **OK**.




9. Select the **Detect incoming calls** option.
10. Select the **Enable exact number matching** option, if desired.

11 If you enabled exact number matching, enter the number of phone number digits to match exactly in the **Match # of digits** box, or leave the default setting of 7.




12 Click **OK** to close the Preferences dialog box.

13 Repeat this procedure to enable incoming call detection for any other Maximizer users.

# Phone Masks

Exercise caution when working in the Windows Registry.

The registry entry (HKEY_CURRENT_USER\Software\Maximizer Software\Maximizer\Modules\AMGR\INTL\Phone Mask) overrides the default format of a phone number with the phone mask provided as a value. The mask uses # to indicate digits and can include any other characters (e.g., + - ,).

If the Phone Mask registry key does not exist, you must create it as a String value.

The mask formats from right to left. For example, if the phone mask value is ###-####, but a user enters a 10-digit phone number (e.g., 1234567890), the result would be formatted as 123456-7890. If the value has fewer digits than the mask allows, the extra (left-most) placeholders are not used.

### Examples

| Phone Mask | Digits | Value Typed in | Display |
|---|---|---|---|
| Not specified (default) | 7 | 1234567 | 123-4567 |
| | 10 | 1234567890 | 123456-7890 |
| ###-#### | 7 | 1234567 | 123-4567 |
| | 10 | 1234567890 | 123456-7890 |
| (###) ###-#### | 7 | 1234567 | 123-4567 |
| | 10 | 1234567890 | (123) 456-7890 |
| +1 (###) ###-#### | 7 | 1234567 | 123-4567 |
| | 10 | 1234567890 | +1 (123) 456-7890 |
| ### ## ####-###### | 15 | 123456789012345 | 123 45 5678-012345 |

The Phone Mask value affects the display of phone numbers in Maximizer program dialog boxes and window lists. The Phone Mask value is read during program startup.

CHAPTER 8

# Working with Maximizer

*Manage Your Address Book Entries*

## In this chapter...

# What is Maximizer?

Maximizer is a complete software solution that brings together elements of sales force automation, eCommerce, and other related applications to meet the sales challenges of modern businesses.

- Managing your company's lists of Companies, Individuals (people not associated with a Company), and Contacts (people associated with a Company or Individual).
- Keeping track of your scheduled appointments and tasks.
- Sending letters, faxes, or emails to one or many recipients.
- Managing incoming orders and inquiries from your online catalog—payment, refunds, shipping, and reporting.
- Organizing and accessing your sales and marketing literature in a shared library.
- Generating reports from any of the lists—Address Book entries, opportunities, Hotlist tasks, and additional information you keep on your entries.

# Maximizer Windows

The main Maximizer window is the Address Book window, which lists the Companies, Individuals, and Contacts in your Maximizer database (Address Book). The following list provides a brief description of each main window accessible from Maximizer.

## My Work Day

The My Work Day screen is an area where everyone in your company using Maximizer can see Hotlist tasks and appointments.

## Address Book

The Address Book window contains all the information about your prospects, customers, business and professional associates, or any other group of people you deal with on a regular basis. It links you to related information about each Address Book entry, such as Contacts, Hotlist tasks, opportunities, documents, user-defined fields, and orders and inquiries.

## Opportunities

The Opportunities window helps you and your colleagues manage complex sales that involve the participation of more than one person in the buying decision.

Use the Opportunities following window to view the opportunities associated with the entries selected in the Address Book window.

## Hotlist

The Hotlist is a to-do list of tasks and reminders that are usually timeless. The Hotlist is where you record actions and follow-up activities related to your interactions with Companies, Individuals, and Contacts. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

## Calendar

The Calendar window allows you to schedule, print, and view your appointments with Maximizer users or Address Book entries. Because the calendar works with the Peg Board feature, you can make sure that when you have an appointment, others can see when you're busy or out of the office. If you need to be reminded of an appointment, Maximizer can sound an alarm in advance of the appointment or task.

## Email

The Email window provides you with the ability to send and receive email within Maximizer using your existing email system. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily. Additionally, you can transfer data files by email.

## Contacts

The Contacts window displays the current Contacts for the Company or Individual selected in the Address Book, Hotlist, or Opportunities window. You can use this window to add, update, or delete a Contact.

## Notes

The Notes window records your Address Book activities and displays only those notes that belong to the selected Address Book entry or opportunity.

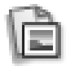
## User-Defined Fields

The User-Defined Fields window displays the custom fields for the selected Address Book entry or opportunity. You assign values to these fields, and, if your system administrator has given you the access rights, you can add, change, or delete user-defined fields.

## Personal

The Personal window contains the Journal and Expenses windows, which provide a location to keep notes and financial records that are not associated with Address Book entries.

## Documents



The Documents window displays the document entries for the selected Address Book entry or opportunity. You can add new documents, as well as files not created in Maximizer, modify a document, or delete a document.

## Company Library

The Company Library is used to store vital sales and marketing information for everyone to access. The Company Library allows you to preview and open any note and many types of files in the preview pane.

## OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window for tracking and post-order fulfillment. You can use the same OrderDesk window to enter a new order, capture a payment for an order, pre-authorize a payment for an order, complete a pre-authorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods. OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled.

Use the Address Book OrderDesk following window to view the orders and inquiries associated with the entries selected in the Address Book and Opportunities windows.

## Accounting

If you have the Accounting Link Designed for Use with QuickBooks® add-on component installed, this window contains all your invoices, estimates, and purchase orders for your Address Book entries. You can create these items in Maximizer and the transactions are automatically shared with your QuickBooks software.

For information on using the Accounting Link, see the online manual installed with the Accounting Link Designed for Use with QuickBooks.

# Window Layout

You can control what windows are displayed and how they're laid out. The Window > Window Settings > Window Layout menu provides three Maximizer window views—Classic, Outlook Style, and Custom.

- **Classic** displays the following windows below the controlling (main) windows. This setting is Maximizer's default window layout.
- **Outlook Style** is somewhat similar to Microsoft Outlook's display. The controlling windows form the left pane while the following windows occupy the top-right and bottom-right panes.
- **Custom** allows you to control what windows are displayed. For example, use this option if you only want the Address Book and Calendar windows open, without their following windows open. Open the windows you want using the Window menu or the icons on the icon bar, and then tile the windows using the Window > Window Management > Tile feature. Of course, you can manually size any window.

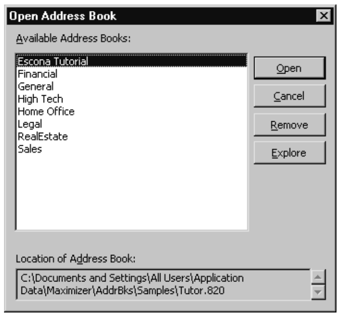
You can also control such things as the colors, fonts, and grid lines in your windows. The Window > Window Settings > Set Color and Window > Window Settings > Set Font menu items allow you to do so.

# Opening an Address Book

Address Books can be opened in Administrator or Maximizer. There are no conflicts if you open an Address Book while it is being used by other users.

### ➤ To open an Address Book

1. Select **File** > **Open Address Book**.
2. Use the Explore button in the Open Address Book dialog box to browse to the location of the selected Address Book if it does not appear in your Address Book list.




3. Select the **Address Book** to open. The Login dialog box appears.
4. Type your **password** and click **OK**. The name of the Address Book appears in the application title bar.

ⓘ The default password for new users and for the users in the sample Address Books is "maximizer".

### ➤ To log into the current Address Book as another user

1. Select **File** > **Login** or double-click in the **Users** section of the **Maximizer status bar** at the bottom of the window. The Login dialog box appears.
2. Enter a **user ID** and **password**.
3. Click **OK**.

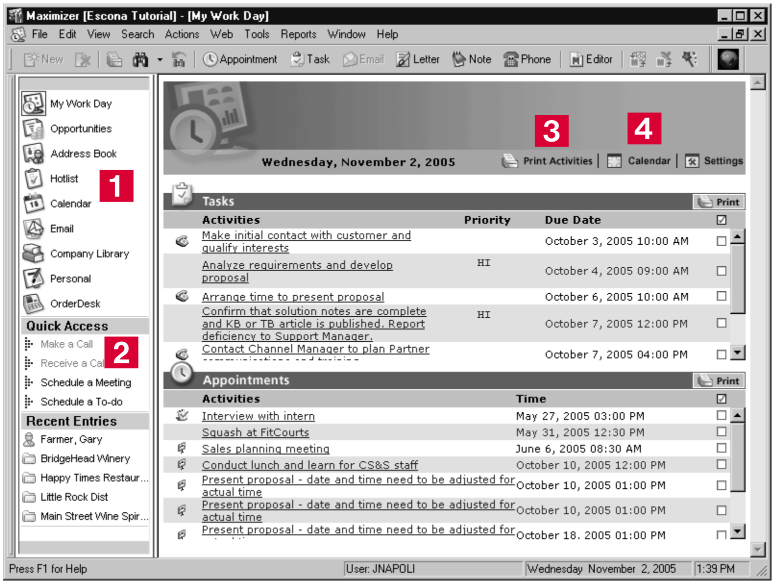
# My Work Day View

The My Work Day screen is an area where everyone in your company using Maximizer can see Hotlist tasks and appointments.

## Adjust the My Work Day View

You can adjust the My Work Day view to suit your own preferences.

### ➤ To adjust the My Work Day view




**1** Use the icons to access the main windows in Maximizer.

**2** Use the **Quick Access** section to perform common tasks. The **Recent Entries** section displays the most recently used Address Book entries. Click on an entry to make it current.

**3** Use the **Print Activities** button to print tasks, appointments, and activities for the day.

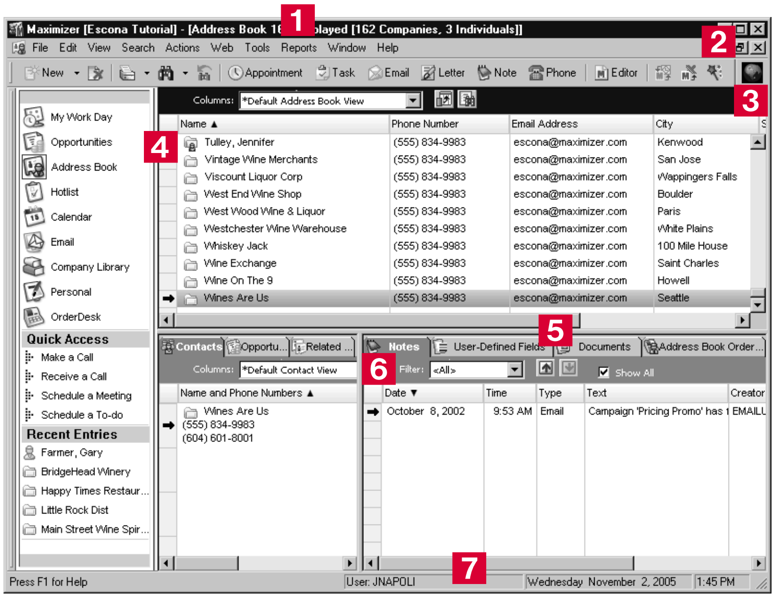
**4** To switch to another calendar day in the My Work Day view, click the **Calendar** button.

# Main Address Book Window

Maximizer is a list-based module, which means that all of the information it accesses is displayed in rows and columns. Lists make it easy to see many entries at once and customize your views.

## Address Book Window

Typically, most of your activities are done in the Address Book Window.




### ➤ To work with the Address Book window

1. There are menu options for all tasks you can perform in the Address Book window and toolbar buttons are available for common tasks.

2. Maximizer wizards are available to help you through tasks such as creating appointments, Hotlist tasks, and web forms.

3. The status indicator shows you when the module is busy when doing tasks such as searches.

4. Icons representing Companies, Individuals, and Contacts differentiate the types of entries.

5. Tabbed following windows display information and attached entries for the selected entry in the main window.

6. The view bars in a window or following window contain a view filter and buttons for common tasks and the column setup. You can also use the arrow buttons to move from one entry to the next.

7. The status bar displays help on the item your mouse pointer is over, and shows the current user, the date, and the time.

As you work with Maximizer, you'll learn to use the many time-saving features. To open one of the Maximizer windows, click an icon in the icon bar or select an item from the Window menu. If you're not sure what a button or icon does, hold your mouse pointer over it to see a "tooltip"—a short description. The status bar also helps you with descriptions of buttons, icons, and menu commands.

Toolbars and the Quick Access section of the window give you quick access to frequently used menu commands. You can display only the toolbars you want or even create your own custom toolbars.

Some functionality is common to both Maximizer and Administrator. For example, adding user-defined fields and adding users can be done in both programs. You can also refer to the Maximizer and Administrator online Help for more information.

## Adjusting the Icon Bar

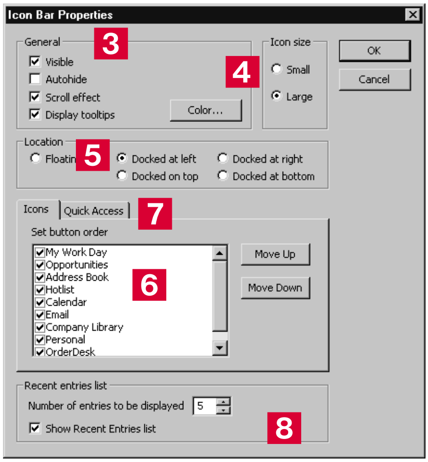
You can adjust the icon bar properties and also choose the state of its visibility.

### ➤ To adjust the icon bar

1. Select **Toolbars** from the **View** menu, or right-click in any frame containing a toolbar and select **Customize** from the shortcut menu. The Toolbars dialog box appears.
2. Select **Icon Bar** and click the **Properties** button.
3. Set your defaults in the General group box. The **Autohide** option minimizes the icon bar at all times and the **Scroll effect** displays the icon bar only when you move your mouse over the tabs. Note that the scroll effect applies only when the icon bar is minimized using the pin graphic. See the F1 help for information on the other options.
4. Set the icon size to **Small** or **Large**.
5. Set the location of the icon bar. The **Floating** option allows you to place the icon bar anywhere inside the Maximizer window. The **Docked** option places the icon bar on a border of the Maximizer window.
6. Select the icons you would like to be displayed.

7 Click the **Edit** button on the **Quick Access** tab to add or remove commonly performed tasks displayed in the Quick Access section. You can also remove the selection from the Show Quick Access list option to hide the section.

8 Set the number of entries to be displayed in the **Recent Entries List** section. You can remove the selection from the **Show Recent Entries list** option to hide the section.



# Customizing Maximizer Toolbars and Toolbar Buttons

To change the properties of an existing custom toolbar or toolbar button, select View > Toolbars, select the custom toolbar and click Customize. You can then select a specific button to modify its properties.

From a Maximizer custom toolbar you can perform specific actions such as launching another application or performing a specific search that was saved in your search catalog.

## ➤ To create or modify a custom toolbar

1. Select **View** > **Toolbars** from the menu.

   – or –

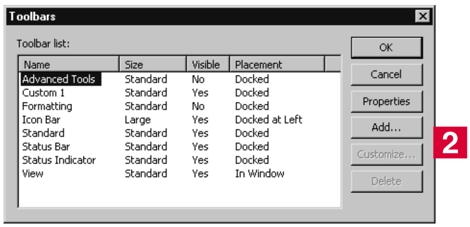
   Right-click in any frame containing a toolbar and select **Customize** from the shortcut menu.

   The Toolbars dialog box appears.

2. To create a new custom toolbar, click **Add**.

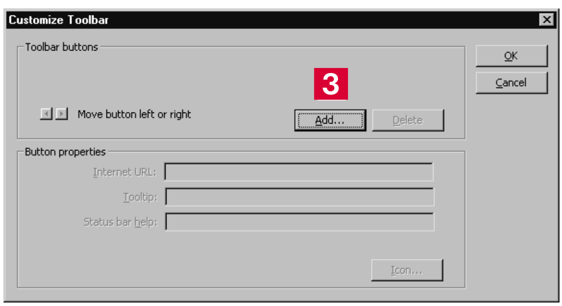
   – or –

   To add a button to an existing Custom toolbar, select the existing custom toolbar, and then click **Customize**.



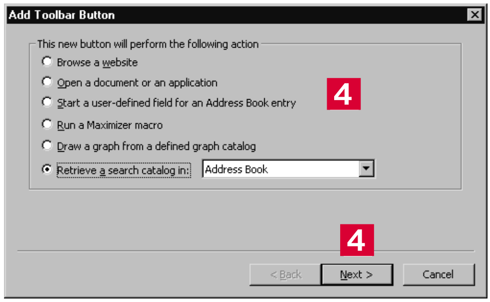

   The Customize Toolbar dialog box opens.

3. Click the **Add** button.




   The Add Toolbar Button dialog box appears.

4 Under **This new button will perform the following action**, select one of the following options, and then click **Next**.




- **Browse a website**

  To add a button to browse a specific website or website document (usually beginning with http:// or www), select this option.

- **Open a document or an application**

  To add a button to start an application such as a word processor, spreadsheet, graphics program, or to open a specific document or file, select this option.

- **Start a user-defined field for an Address Book entry**

  This option enables you to set up a relationship between an alphanumeric user-defined field and a toolbar button. When the toolbar button is clicked, the value of the specified UDF is treated as the fully qualified name of a document or an application that is to be started (opened).

- **Run a Maximizer macro**

  To add a button to run a Maximizer macro, select this option. This option is grayed out if no macros are present in the current Address Book.

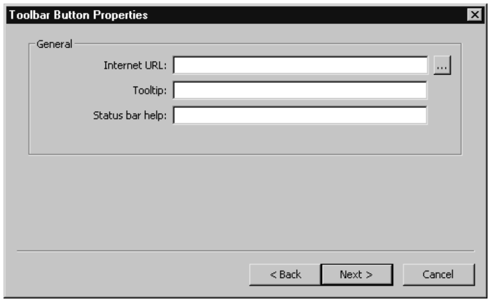
- **Draw a graph from a defined graph catalog**

  To add a button to run a graph that has been saved in the graph catalog, select this option. The option is grayed out if no graphs have been saved in the catalog.

- **Retrieve a search catalog in [window]**

  To add a button to perform a search that has been saved in the search catalog, select this option. Also choose the window to which the search pertains from the drop-down list. For example, if you have created a search catalog entry for searching in the Opportunities window, select Opportunity.

5 If you have chosen to **Browse a website** or **Open a document or an application**, click **Next**, and type the path of the document/application or web address (URL). Or, click the **Browse** button to locate the document/application or URL to run. If you would like an application to open a specific file, make sure that the application path is enclosed in double quotes and put a space after the path of the application. Then click **Next**.

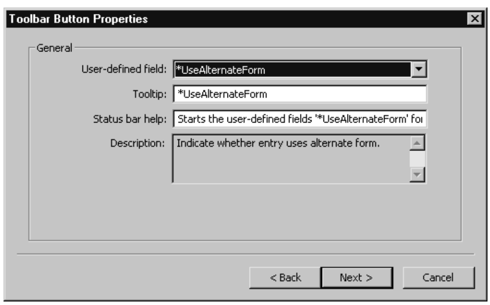



For example, to launch WordPad and open the file Notes.txt, in the Document/Application text box type the following:

"C:\ProgramFiles\Accessories\WordPad.exe" C:\Notes.txt

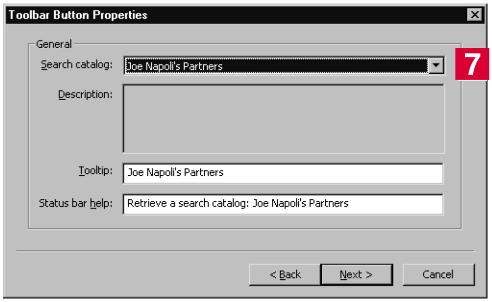
To load a new instance of an already running program, click the **Load new instance** checkbox.

6 If you have chosen to **Start a user-defined field for an Address Book entry**, **Run a Maximizer macro**, or **Draw a graph from a defined graph catalog**, click **Next**, and select it from the drop-down list. Then click **Next**.

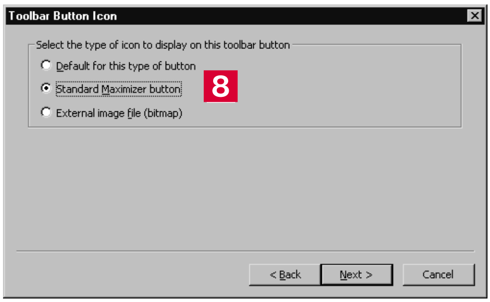



The lists contain all user-defined fields, macros, and graphs in the current Address Book.

**7** If you have chosen to **Retrieve a search catalog**, select the search catalog from the drop-down list in the Toolbar Button Properties dialog box, click Next, and then edit the **Tooltip** and **Status Bar Help** text if you wish. Then click **Next**.

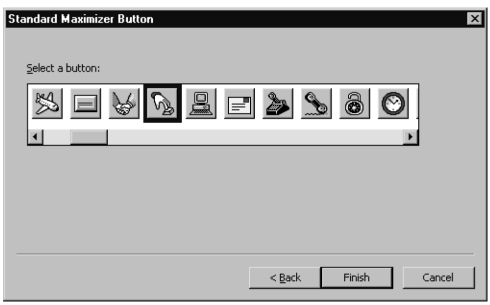



**8** Select the type of button you would like to display in the toolbar, and then click **Finish** or **Next** depending on the option you chose.

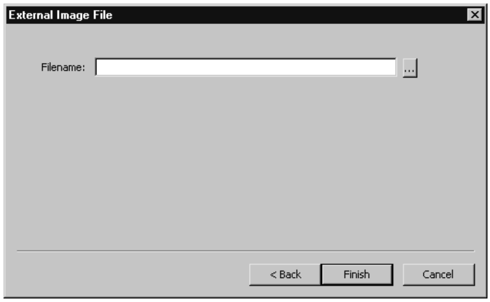



If you choose to display the default button, Maximizer will select the button automatically and you may go on to step 11.

**9** If you choose to use a **Standard Maximizer button**, select one of the available buttons.

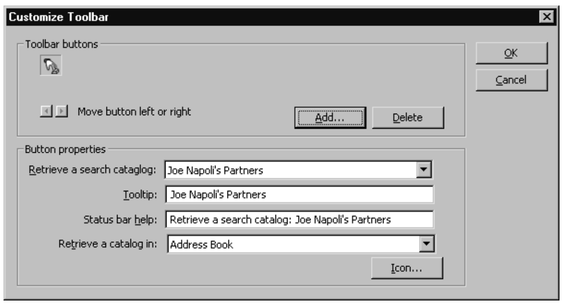


10 If you choose to use an **External image file (bitmap)**, locate the image using the **Browse** button.




11 Click **Finish**.

12 If desired, change the position of the new button on the toolbar using the arrows.



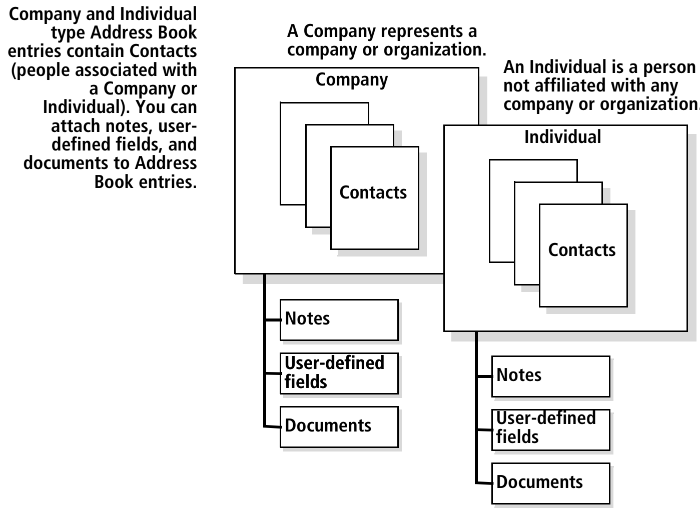

13 Click **OK** and then click **OK** again to close the Toolbars dialog box.

# Keeping Track of Your Prospects and Customers

Maximizer's focus is on Address Book entries—Companies, Individuals, and Contacts.

The Address Book window gives you the ability to manage your daily activities with companies, and the people who work for them. In addition to the basic Address Book information, including addresses, phone numbers, and email addresses, you can record other important information, such as relationships between companies or extra details, like the business type.

As you work with the Address Book entries in your Maximizer Address Book, you can keep notes on your activities, so you can always have a history of your activities with your customers.




## Add Address Book Entries to Your Address Book

For more information on adding Address Book entries, open the Maximizer online Help and look up "Address Book entry".

Typically, "Company" entries represent a corporate entity you would like included in your Address Book. "Individuals" represent a person who is not affiliated with a company or organization. "Contacts" are entries that are always associated with a Company or Individual. "Address Book entries" refers to all Companies, Individuals, and Contacts in your Address Book window.

If you need to add people to your Address Book, add them as Individuals or as Contacts of an Individual or Company. If you need to delete a Contact, its associated notes and documents are automatically transferred to the "parent" Company or Individual, which ensures you maintain a record of all interactions with a company, even during changes.

### ➤ To add an Address Book entry

Note that the type of entry you select to enter determines its available Key Fields.

1. To add an Address Book entry, click the **arrow** button next to the **New** button on the toolbar and select one of the options. You can also right-click in the Address Book window and choose an option from the Add menu.

   To add a Contact for an entry, select the Company or Individual to which the Contact will belong. In the Contacts window, press Insert or right-click and select Add Contact.

2. Enter the name, the mailing address details, website, phone numbers, and email addresses as required. Phone number and email address description types are entered in the field on the left of the number or address.

   To enter an alternate address for the entry, click the **Address** button. To use an alternate address as the default address, select it in the Mailing Address dialog box and click the Select button.

Mandatory user-defined fields and Key Fields are set up in Administrator.

3. Select the **Key Fields module** and specify a value for the **Key Fields**. These are common used fields that are specific to your company.

   Up to 8 Key Fields may be specified for the various Address Book entry types and opportunities. Key Fields are set up in Administrator—they will not appear in Maximizer unless they have been specified. For more information on Key Fields, refer to "Creating Key Fields Lists" on page 83.

You have the option of opening Address Book entries in view mode or edit mode. This setting is controlled in the Address Book window Preferences dialog box (click the Preferences button). You can also control this setting in the System Defaults preferences tab.

4. Enter the Address Book entry details (**Company Details**, **Individual Details**, or **Contact Details)** such as the Address Book entry **Category**. Click inside the field on the right and then click the ellipsis button for access to the possible field values.

5. You can click the **Detailed Report** button to print an Address Book entry report.

If you are in View mode in the Address Book entry dialog box, you can click the **Copy** button to quickly copy the text to your clipboard so you can paste it into other documents.

6. You can click the **Favorite List** button to see which Favorite Lists to which the entry is assigned. This button also provides you with a way to quickly remove the entry from a Favorite list or add the entry to a Favorite List.

7. You can click the **Properties** button for access to information such as the creation date and Address Book entry identification number.

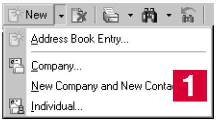
8. You can perform common tasks associated with the Address Book entry by clicking the **Actions** button.

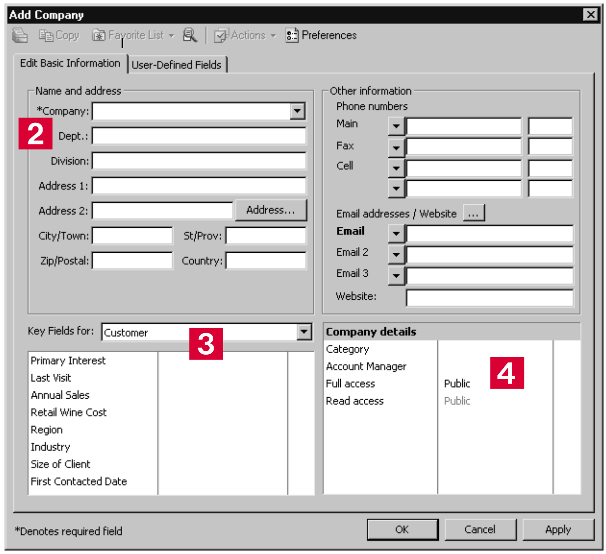
9. You can click the **Preferences** button to set the default for opening an Address Book entry to View or Edit mode. You can also set your preference for the mailing address format.

To view an Address Book entry's properties, select the entry, right-click, and choose Properties.

10 Click the **User-Defined Fields** tab and fill in any associated user-defined fields. Make sure you select the field and then click inside the field on the right to access the possible values for the field.

Selecting the **Show Blank Fields** option shows all fields in the Address Book, not just those with values defined for the Address Book entry.



# Create a Default Address Book Entry

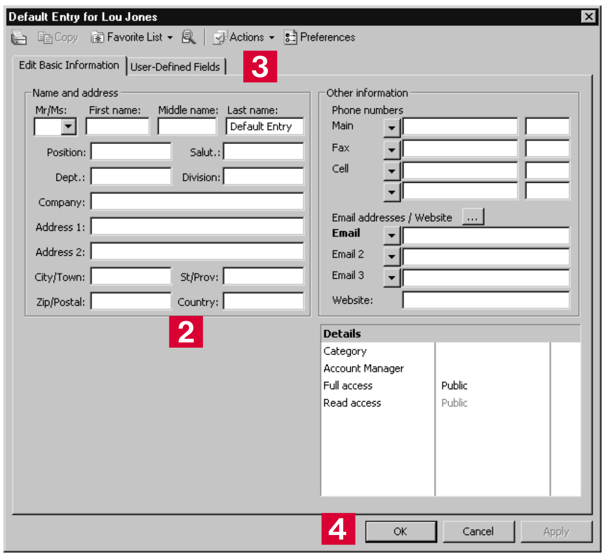
Default entries are user-specific so each user in the Address Book can have different default entries.

If you are logged in as the Master user, you can edit multiple default entries at once. Choose View > Default Entries for All Users, then select the entries you would like to edit, and choose Edit > Global Edit.

Creating a default entry provides you with some fields that are already filled in when you create a new Address Book entry. Default entries are useful if you often enter many fields in common, such as the same city or country. Each user in an Address Book can have a unique default entry.

## ➤ To create a default Address Book entry

1. In the Address Book window, select **Default Entry** from the Edit menu. The Default Entry dialog box appears.
2. Fill in the fields to include as default information.
3. Click the **User-Defined Fields** tab to include specific fields in the default entry.
4. When you are finished, click **OK**.




Now, when you create a new Company or Individual, the entry screen appears with the default fields already filled in. The default entry affects all the new Address Book entries you create. When you no longer want to use default information, you should delete the default entry.

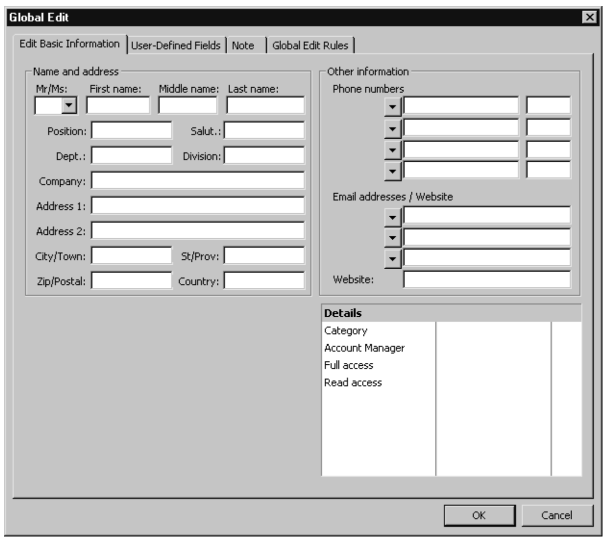
# Change Several Address Book Entries with Global Edit

You can update a number of Address Book entries at the same time with the Global Edit command. For example, you may want to add a FAX Phone extension to several entries. Global Edit is a very powerful feature, so you might consider making a backup of your Address Book before making significant changes using Global Edit.

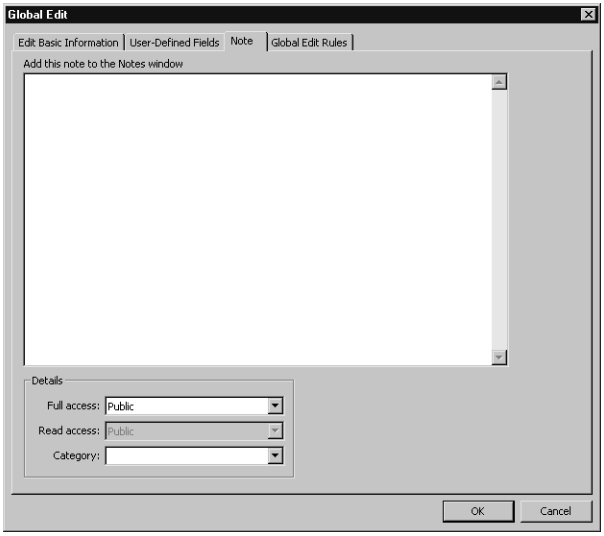
## ➤ To perform a global edit

1. In the Address Book window or Contacts window, select the entries you want to modify.
2. Select **Global Edit** from the **Edit** menu. The Global Edit dialog box appears.

   Apply your edits to the Basic Information or User-Defined Fields tabs. Changes made to these tabs are applied in the same way as when you are entering an Address Book entry. The changes are applied to all Address Book entries included in the global edit. If you don't select any entries, the edits are applied to all your entries in the current list.



3. Click the **Note** tab and add a description for the global edit. This adds a note to each of the affected entries. You can also specify the **Access Rights** for the default note and a **Category** (categories are created in Administrator preferences).




4. Click the **Global Edit Rules** tab.

5. Under **Mailing Rules**, set the mailing address options.

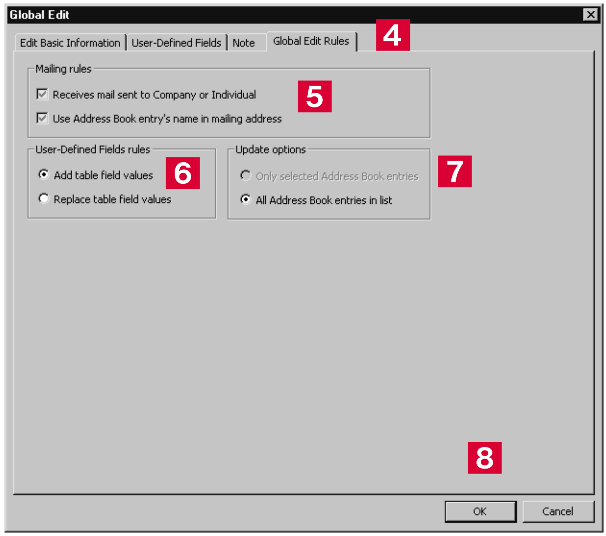
   All options in this tab have three possible states selected, not selected, and selected with a gray background.

   - The **Receives Mail Sent to Company or Individual** option applies to Contacts. Select it if you want to send mailings to the associated Contacts when sending mail to the Company or Individual.
   - The **Use Address Book Entry's Name in Mailing Address** option lists the Address Book entry name as well as the Contact name (if applicable) in the mailing address.

6. Select the appropriate item in the **User-Defined Field Rules** group box. The options in this group box apply to table user-defined fields only. To replace the current user-defined field values with a new list, select Replace Table Field Values. To add new table user-defined field values to existing values, select Add Table Field Values.

7. Select the appropriate item in the **Update Options** group box. This option applies only if you have entries selected in your Address Book window.

8 Click **OK** to perform the global edit. You are prompted with a message to verify that you want to continue with the operation.



# Use Column Setups to Organize Lists

Maximizer provides a selection of column setups you can use for the main Maximizer windows, including the Address Book and Opportunities windows. You can also create your own column setups. This allows you to display different fields in various combinations.

### ➤ To create a column setup

1. Select **Column Setup** from the **View** menu or click the **Column Setup** button on the **View** bar.
2. In the **Column Setup** dialog box, click the **Add** button. The **Defined View Properties** dialog box appears.
3. Type a **Name** in the **Details of View** group box.
4. Select **Private** if you don't want to share the column setup with other users.
5. Click a column header in the **Columns in View** group box.
6. Click the **Properties** button to modify the column title or width. In the **Column Properties** dialog box, modify the **title** and/or **width** and click **OK**.
7. Select a field in the **Available Fields** list.
8. Click the **Add** button to add it to the current column. Fields in the current column appear in display order in the Selected Fields list.
9. Change the name of the field label in the **Field Label** field if necessary. Optionally, you can select field separator characters from the drop-down list such as commas, spaces, blanks, or dashes to conserve space and place multiple fields on the same line.
10. Repeat steps 5-9 for each field to add to the column setup.
11. Click **OK** to save the column setup.

### ➤ To use a column setup

- Retrieve a column setup for use with the current window by choosing **View** > **Column Setups**, selecting the column setup view, and clicking **Use Now**.

# Record Relationships with Related Entries

Press F1 in the Related Entries window for more information on related entries.

In the course of business, it's common to have people and companies who are somehow related or connected to each other. For example, one of your contacts might be another's accountant. Maximizer allows you to record these types of relationships in the Related Entries window.

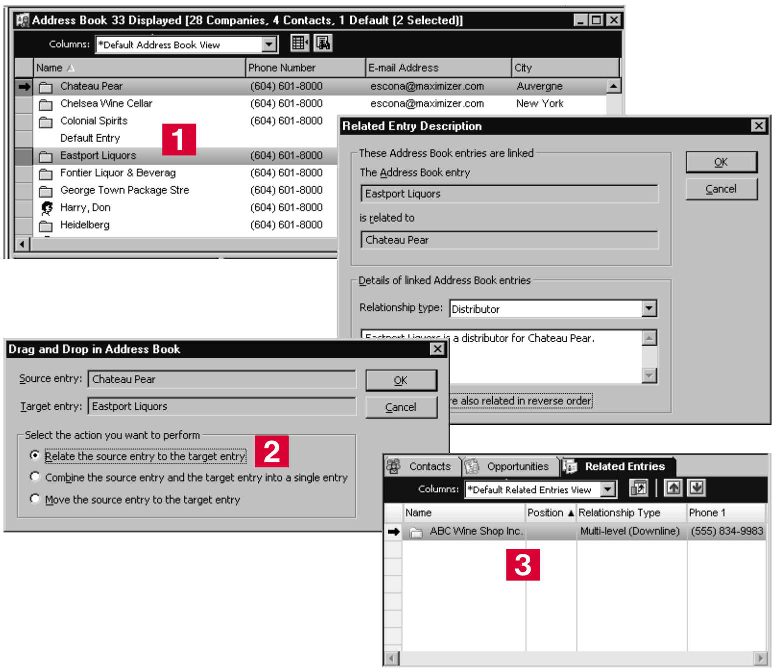
## ➤ To relate to entries

1. Select the two entries you wish to relate to each other and select **Edit > Relate Entries**.

   – or –

   Drag an entry and drop it on to another entry. In the resulting dialog box, select **Relate the source entry to the target entry**.

2. Specify the nature of the connection between the two entries.
3. Each entry appears in the other's Related Entries window.




Any Address Book entry can be related to another. All notes, user-defined fields, and documents associated with a related entry are then linked to the relationship. If an Address Book entry has entries related to it, these are displayed in the Related Entries window.

### ➤ To unlink Address Book entries

- Occasionally, relationships that you may have set up between two Address Book entries will change, and you will want to remove the relationship. You can "unlink" two entries by selecting one of the related entries in the Related Entries window and selecting **Edit > Unlink Selected Entries**.

## Convert Individuals to Companies and Contacts to Individuals

If you originally created an entry as an Individual and now decide the entry would be more appropriate as a Company with Contacts, you can convert the entry.

In the conversion, Maximizer copies the entire contents of the Individual to a new Company entry—all data is converted, including the Individual's Contacts. The original Individual is automatically deleted in the process.

Additionally, you can convert Contacts to Individuals. You are asked to confirm if you want the new Individual to inherit the Contact's address. All data is transferred to the new Individual entry and the original Contact is automatically deleted.

Any number of Contacts or Individuals can be converted at once.

### ➤ To convert Address Book entries

- To convert Individuals to Companies, select the Individuals you want to convert and select **Edit > Convert Individuals to Companies**. To convert Contacts to Individuals, select the Contacts you want to convert and select **Edit > Convert Contacts to Individuals**.

# Keeping Notes on Your Address Book Entries

Notes are used to record activities associated with Address Book entries and opportunities. The Notes window is a following window, which means it displays notes only for the selected Address Book entry or opportunity.

Use the Notes window to jot down “manual” notes—your ideas and impressions about a customer or an opportunity. You can enter manual notes for short company profiles or summaries of contracts and business agreements.

You have the ability to create a default note for the Address Book, Opportunities, and Journal windows. The default note for each window can be different and is specific to the current user. The text automatically appears as part of the note body when you create a new note. The note owner and category can also have default values.

By default, notes are logged for all of the main activities you can perform in Maximizer. Logging preferences can be adjusted on the File > Preferences > Logging tab.

Other note types are automatically created by Maximizer, providing a history of all your email, phone calls, letters, timed notes, opportunities, appointments, tasks, and transferred Address Book entries. The note type descriptions are as follows:

- **Email** – created in the Address Book window when you send an email to one or more Address Book entries.
- **History** – created in the Opportunities window when opportunities are added or changed.
- **Mail-outs** – created when you print documents, labels, envelopes, or letters using the Maximizer Word Processor's merge feature.
- **Manual** – added manually to the Notes window.
- **Opportunity** – created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
- **Phone calls** – created when you dial a phone number, or log a received call.
- **Tasks** – created when appointments or Hotlist tasks are scheduled, modified, deleted, or completed. For Hotlist task notes, the current owner of the Hotlist task is included in the note, even when a task is reassigned. For appointment notes, details of the appointment are included when the appointment is scheduled and when an attendee list is modified, an additional note is logged.
- **Timed** – created when you use the Timer.
- **Transfer log** – created when you transfer entries between Address Books.

### ➤ To work with the Notes window

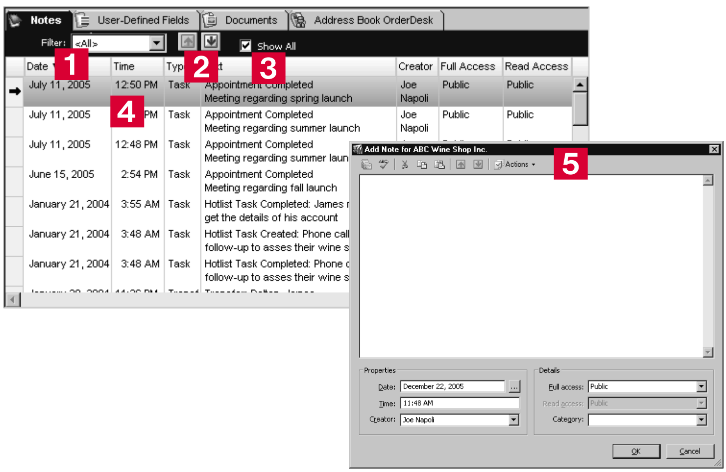
1. Use the **Filter** to narrow the entries to a specific note type (e.g., "Email"). Choosing **<Custom...>** enables you to search for notes that contain certain text, notes that were created by a particular user or accessible by a particular user or group, notes in a specific date range, and/or a combination of note types.

2. Use the up and down arrows to view the notes for the previous or next Address Book entry.

3. Use **Show All** to display all notes for a selected Address Book entry. This includes notes belonging to the selected Company/Individual and all associated Contacts. If this checkbox is not enabled, only those notes belonging to the Company/Individual or the selected Contact are displayed.

4. Double-click an entry to view the entire note. To add a note, right-click in the Notes window or press the **Insert** key.

5. You can perform common tasks by clicking the **Actions** button in the Notes dialog box. You can also spell check your note text.




Select Search > Notes to find any note you want and select Reports > Notes to produce a Notes report. Simply select the types of notes you want in your search or report.

## ➤ To add a note

You can also add a note by copying text to the Windows Clipboard, right-clicking in the Notes window, and choosing Paste Link.

1. In a controlling window, drag an entry to the **Notes** window or to the **Note** button on the Standard toolbar.

   – or –

   From the Notes window, while your entry is selected, right-click and select **Add Note**.

   – or –

   Double-click a blank note cell.

2. In the Add Note dialog box, type your note.

3. Use the **Menu Bar** at the top of the note for various tasks.

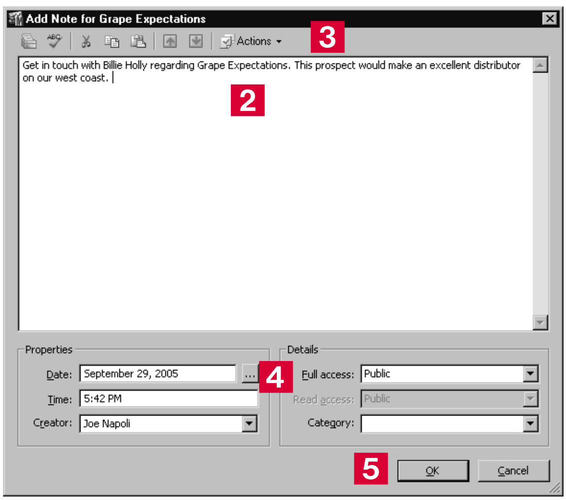
   See the mouse-over text or F1 help for a description of each button. For example, you can check the spelling in your note using the Maximizer Spell Checker. Click the **Spelling** button to initiate the process.

The Category field is available for only manual notes.

4. Adjust the **Date**, **Time**, **Creator**, **Full access**, **Read access**, and **Category**, if necessary. Categories are created in the System Fields tab of the Administrator preferences.

   Press F1 for detailed assistance.

5. Click **OK**.

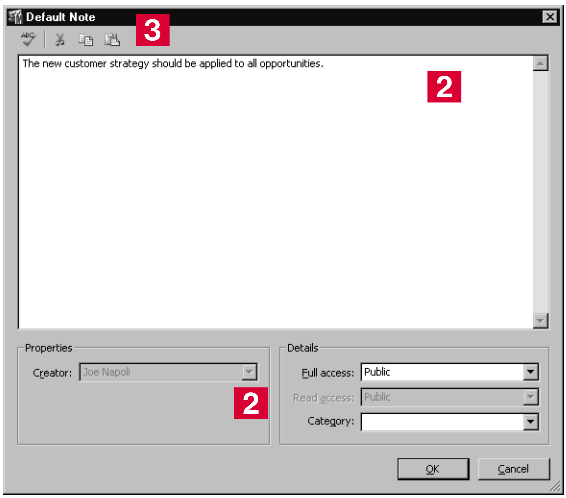


## ➤ To add a default note

1. In the **Address Book**, **Opportunities**, or **Journal** windows, choose **Default Note** from the **Edit** menu.
2. Enter the body text, and if necessary select a user or group for the Full Access and/or Read Access fields. You can also select a note category (these are set up on the System Fields tab in the Administrator preferences).

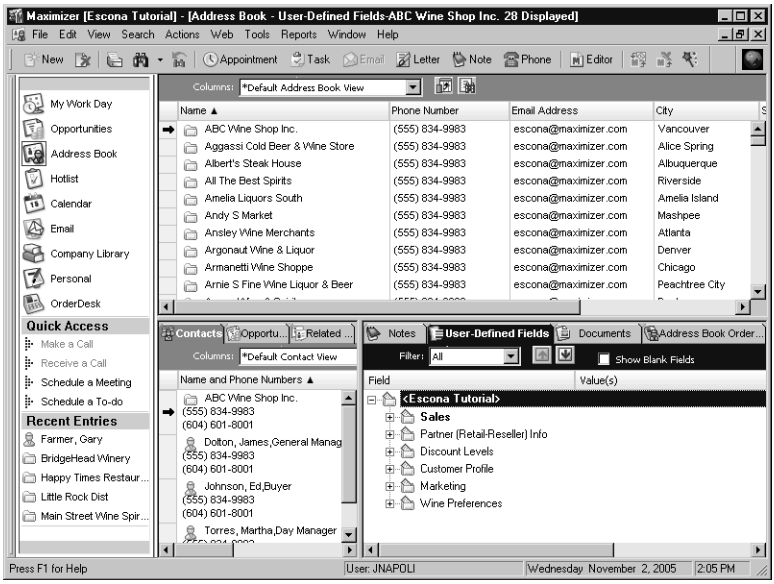
   This information appears as part of the note each time a note for an Address Book entry, an opportunity, or a journal entry is created. Note that the default note can be different for each type of entry.
3. Use the **Menu Bar** at the top of the note for various tasks.

   See the mouse-over text or F1 help for a description of each button. For example, you can check the spelling in your note using the Maximizer Spell Checker. Click the **Spelling** button to initiate the process.
4. Click **OK** to save the default note for each window.

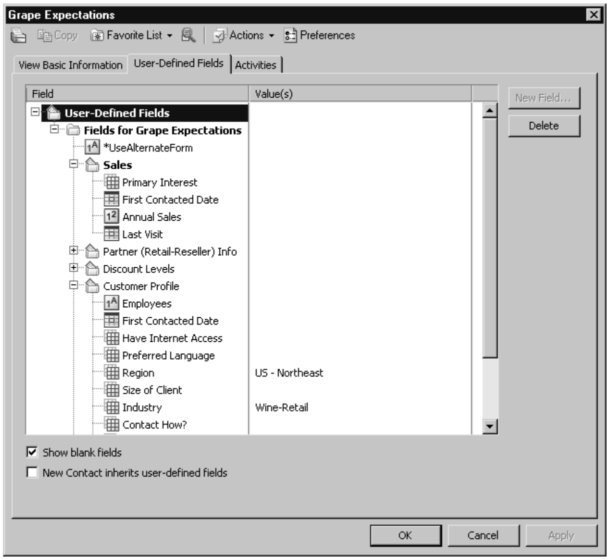


# Working with User-Defined Fields

User-defined fields for Address Book entries and opportunities are available in the User-Defined Fields following window. Which category of user-defined field is visible in the following window depends on which of the main windows is active. For example, when viewing the Address Book window, the User-Defined Fields following window contains only user-defined fields that pertain to Address Book entries, as shown in the following graphic.



You can also access user-defined fields for Address Book entries and opportunities from the User-Defined Fields tab of the dialog box for each Address Book entry or opportunity. The folders and field names appear in a list on the left, and the field values on the right. The following graphic shows the user-defined fields tab of an Address Book entry.




User-defined fields that pertain to user accounts are available from **File** > **Users** > **Properties** > **User-Defined Fields**.

Keep the following points in mind when working with user-defined fields:

- By default, user-defined fields are displayed in tree view, where fields are nested within folders. You can also display the fields in an alphabetical list, without their folder structure. You can set your default user-defined field view by selecting **File** > **Preferences**, and setting the **View User-defined fields in tree view** option on the **System Defaults** tab.
- When you select the **Show blank fields** option when using the User-Defined Fields window, all user-defined fields in the Address Book are displayed, not only the fields with existing values. Double-clicking on a field in the window allows you to add or modify a user-defined field value.
- **Mandatory fields** are denoted with an asterisk displayed after the field name and type. This is not the same as having an asterisk included as part of the field name. System-defined fields are shown in bold, black text.

- The kind of **Address Book information** to which user-defined fields apply—Address Book entries, opportunities, or users—controls the window in which the user-defined field is available. For example, if you create an opportunity user-defined field, it will be available in the User-Defined Fields following window only when the Opportunities window is the controlling window.
- If a **Contact** is associated with an entry, the **Company** and Contact user-defined fields are shown in separate folders.
- Your selection of user-defined fields is usually set up by your system administrator using Administrator. However, any user can be given the rights to create, change, or delete user-defined fields in Maximizer. If you have not been given the ability to set up user-defined fields, you can only assign values to existing fields.

# Creating a List of Entries with a Search

Many of the actions you can perform with Address Book entries and opportunities apply to the entire list of entries in the active window. For instance, when you print a report from the Address Book window, you are generally given a choice between printing the selected entry (or entries) or printing the entire list. When you perform a mail merge, for instance, you generally use the entire current list.

A search retrieves any entries that match the search criteria and that you have the rights to view.

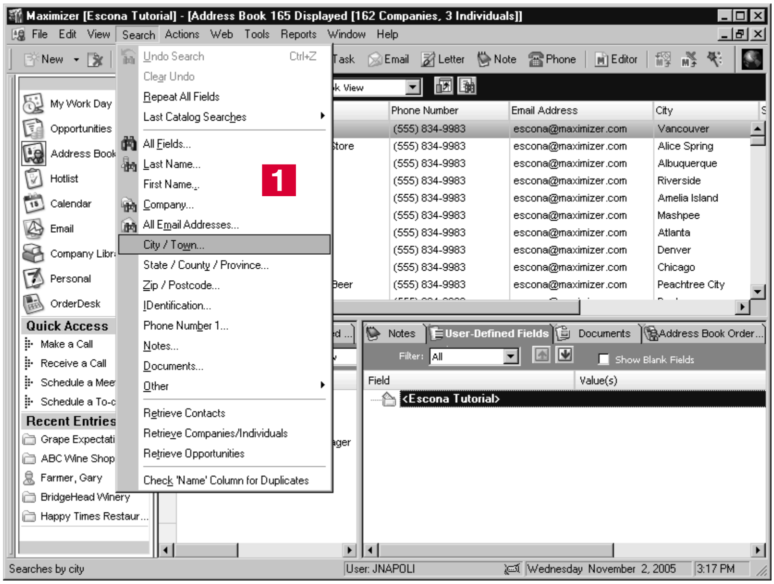
Maximizer's search features let you search any field for the data you specify and modify your current list with the matching entries. If you wanted to create a list of Address Book entries in Washington State, for example, you would search the State/Province field for entries with "WA" in that field.

## Search for Entries by a Field

Maximizer makes it easy to search by some of the basic fields, such as Last Name, Company, City/Town, or Email for Address Book entries or by Status or Revenue for opportunities. The Search menu varies depending on what window is selected.

## ➤ To search entries by a field

**1** From one of the main windows such as the Address Book or Opportunities window, select the field you are searching for from the **Search** menu. Select **Other** to see additional fields by which to search your Address Book entries.



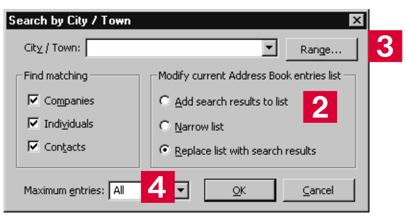

**2** In the Search By [field] dialog box, specify the search criteria.

You can select one of three options for updating the current list with your search results:

- **Add search results to list** searches the entire Address Book and adds the matching entries to your list.
- **Narrow list** searches your current list and reduces it to the matching entries.
- **Replace list with search results** searches your Address Book and replaces your current list with the matching entries.

**3** If applicable, specify the **Range** of the items to search.

**4** Specify the **Maximum entries** to be returned in your search. This number is important to note because it affects what is displayed in your list after your search.



# Perform an Advanced Search by All Fields

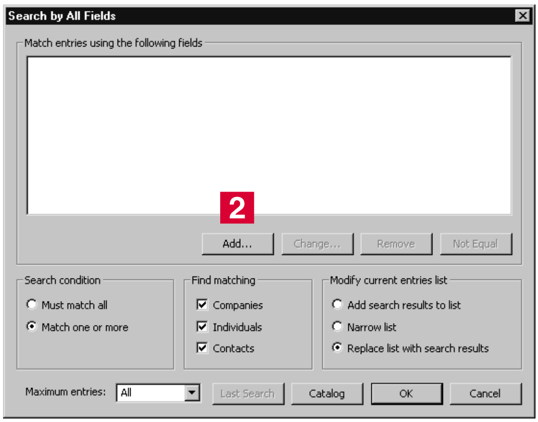
In the Address Book window, you can click Repeat All Fields to repeat the last search. Once a search is saved in the catalog, you can access the most recent catalog searches right from the search menu.

Maximizer's Search by All Fields feature is useful when you need to search by fields that aren't listed in the Search menu or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search in the catalog for later use.

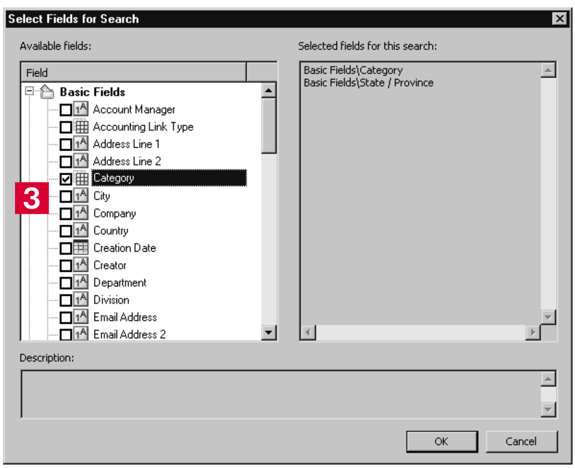
Use the Search by All Fields feature to find user-defined fields or a combination of user-defined fields and other fields to produce a custom list of Address Book entries and opportunities.

## ➤ To search by all fields

1. In the Address Book window, select **Search** > **All Fields**.
2. In the Search by All Fields dialog box, click the **Add** button.

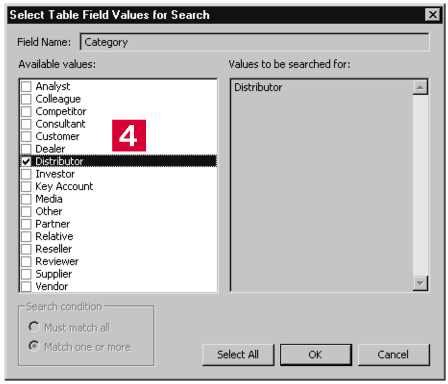



3. In the Select Fields for Search dialog box, select one or more fields and click **OK**.



4 In the Specify Field Values for Search dialog box, select one or more values, click the **Add** button, and then click **OK**.

For each field you've chosen from the previous step, you will be prompted to specify the values. Use the search condition options to further narrow your search.




5 Specify the remaining search criteria in the Search by All Fields dialog box.

If you wish to build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the **Not Equal** button.

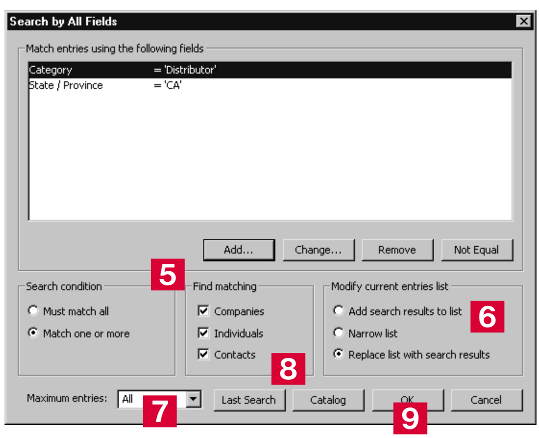
To retrieve all Address Book entries that do not have email addresses, do a search by all fields, choose the email field, leave the search range blank, and then click the Not Equal button.

6 The matching entries in the Address Book will replace the current Address Book entry list. Select an option according to how you would like the current list to be updated.

7 Select or type the **Maximum entries** you would like to be returned and click **OK** to begin the search.

8 Use **Last Search** and **Catalog** for previously defined searches.

9 Click **OK** to start the search.



# Create a Favorite List from a Search

After you've performed a search, you can create a Favorite List so it can be easily accessed. Favorite Lists are available in the Address Book window.

### ➤ To create a Favorite List of entries

1. Search for the entries you want saved in the Favorite List.
2. Select **View > Favorite Lists** and then click the **Add** button.
3. In the Favorite List Properties dialog box, enter a **Name** and **Description** for the list.
4. In the **Owner** drop-down list, select your user ID if you don't want to share the list with other users.
5. When you are creating a Favorite List for Address Book entries, if you want this Favorite List to appear each time you open Maximizer, select the **Retrieve this list when an Address Book is opened** option in the Favorite List dialog box.

   Once this option is selected, the setting overrides the **Ask at program startup which Address Book list to view** option on the **System Defaults** tab.

### ➤ To retrieve saved Favorite Lists

- To retrieve the list, select **View > Favorite Lists** and select the list you want to view. You can also use the **View > Recent Favorite Lists** to retrieve Favorite Lists you've recently accessed.

### ➤ To add entries or remove entries in a Favorite List

1. In the **Address Book** window, select the entries to appear in your updated list.
2. Choose **Add to Favorite List** or **Remove From Favorite List** from the **View** menu.
3. In the Favorite Lists dialog box, select the **Favorite List** you are updating.
4. Choose **Selected entries**, **Current entries**, or **All entries**.
5. Click **OK** to confirm that you want to update the list.

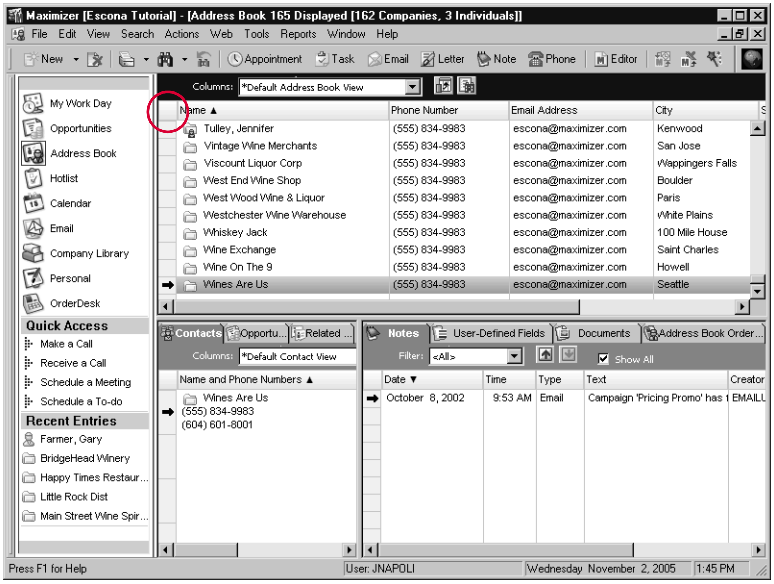
   Maximizer replaces the selected Favorite List with the entries in the current list.

# Select and Display Entries in a List

After you've performed a search, you will most likely want to perform some action on the entries or a subset of the entries. There are a couple of ways to quickly select and display entries in a list.

## ➤ To select all entries in a list

- Click the gray button on the top left of the corner of a main window such as the Address Book window, as shown below.




## ➤ To display only selected entries

- If you have selected several Address Book entries in your current list, select **Edit** > **Make Selected List Current** to remove the deselected entries from the current list and only display the selected entries.

# Tracking Your Appointments and Hotlist Tasks

To learn more about the Hotlist window, press F1. For assistance adding a Hotlist task, select the Wizards button on the Standard toolbar and run the Add Hotlist Task wizard.

The Hotlist is a timeless "to-do" list of tasks and reminders. Tasks include calling and writing to customers. Use the Hotlist window to record actions and follow-up on personal activities, such as producing expense reports, or those related to your interactions with Address Book entries. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

## Hotlist Window

Tasks can be reassigned to another user. When a Hotlist task is added or reassigned, a note is created in the Notes window. This note includes the name of the person to which the Hotlist task is assigned.

Because the Hotlist is a controlling window, all your following windows update with it providing you with instant access to all information about the person or organization with which you are dealing. You can quickly handle all your communications—from phone calls to email—and record the results directly from the Hotlist.

### ➤ To use the Hotlist window

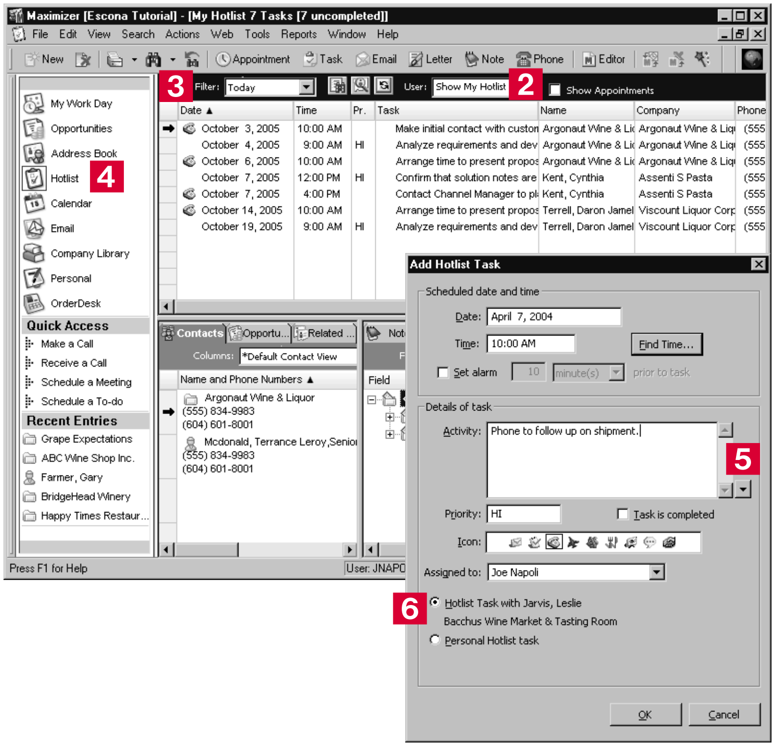
1. Click the **Hotlist** icon or choose **Hotlist** from the **Window** menu.
2. Select the **Show Appointments** option to have your appointments appear in your list with your tasks.
3. Use the view **Filter** to choose the date range you want to show.
4. To add a new task, click **Insert** in the Hotlist window.

   – or –

   If a task is associated with an Address Book entry, select the entry in the Address Book window and drag it to the Hotlist icon.

   You can view or modify an existing task by double-clicking the task.
5. Select a pre-defined **Activity** from the drop-down list (click inside the text box to access) or enter an activity.
6. A task can be personal or associated with an Address Book entry. To mark a task as personal, select the corresponding option.

Otherwise, the task is created for the current Address Book entry.



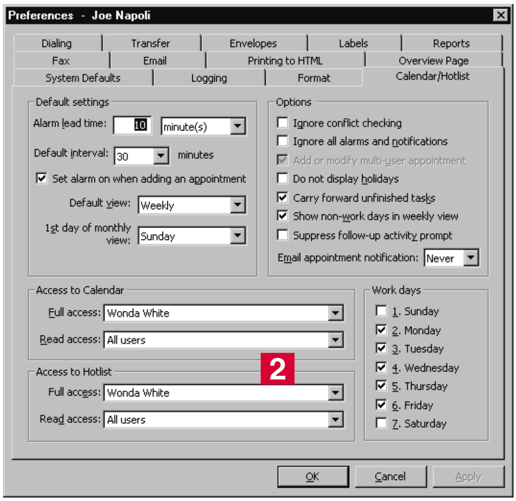
# Control Calendar and Hotlist Task Preferences

Use the Calendar/Hotlist preferences tab to change your Hotlist task and calendar preferences. Most of the options on this tab apply to the calendar.

Hotlist and calendar preferences can also be controlled in Administrator using the user preferences Calendar/Hotlist tab.

## ➤ To set calendar and task preferences

1. Select **File > Preferences** and click the **Calendar/Hotlist** tab.
2. Set your calendar and hotlist default options. For detailed information on each option, press **F1**.




You can control which users can view or modify your tasks and appointments using the **Full Access** and **Read Access** options. For example, if you want a user or group to be able to view your tasks and appointments, select the name from the Read Access drop-down list. The selected user or members of the group can then view your tasks and appointments by selecting your user name from their Hotlist window View bar. If you want them to be able to add or modify your existing tasks and appointments, use the Full Access option.

Appointments can be reassigned through the Hotlist window.

The Full Access option also controls your ability to reassign tasks and appointments to other users, as you can only assign tasks and appointments to other users if they have given you permission.

# Calendar Window

The Calendar window is where you schedule meetings and appointments. You can view, add, update, and delete appointments.

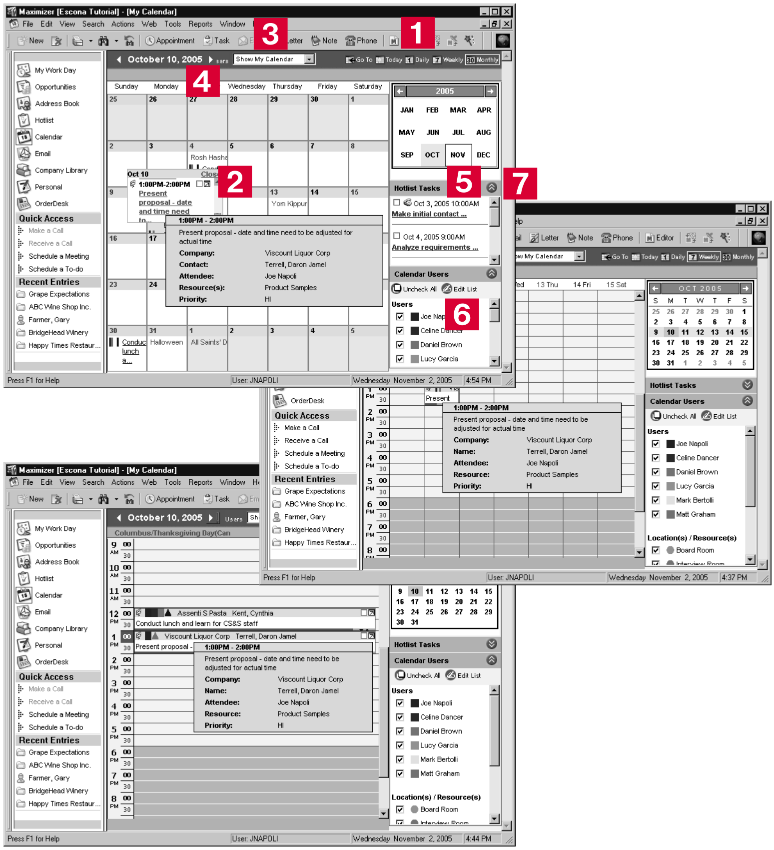
The daily view shows your day in half-hour intervals—use the Calendar/Hotlist preferences tab to change this interval length.

There are a few different available views of the Calendar window—Daily, Weekly, and Monthly. All views are graphical so you can see all your appointments at a glance.

You can view another user's calendar if that user has given you "read access" or "full access". To assist you with scheduling, color bars indicate the attendees and booked resources/locations for the appointment. Note that this includes each of the users and resources/locations you have selected for your Calendar window.

Use the Utilities > Holiday Editor in Administrator to set up the holidays that are displayed in the Calendar window. These holidays can be changed. For further information, see "Recording Holidays in the Holiday Editor" on page 86.

## ➤ To view appointments in the Calendar window




**1** In the **Calendar** window, click the associated button to choose your calendar view—**Daily**, **Weekly**, **Monthly**, or **Today**.

**2** In the monthly view, holding your mouse pointer over a day displays all the appointment details for that day in a pop-up window. You can then hold your mouse over a particular appointment to view the appointment details. Or, you can click on the appointment in the pop-up window to open it.

In the weekly and daily views, holding your mouse over an appointment displays the appointment details. Double-clicking on an appointment opens it.

**3** Open another user's calendars by selecting a name from the **Users** drop-down list. Both the selected user's appointments and your own appointments are displayed. You can also view the booked time for meeting locations and resources by choosing the corresponding value in the list.

4 To quickly navigate from one day to the next in the daily calendar view, use the arrow buttons located in the upper-left section of the window. You can also navigate from week to week and month to month using these buttons when in the weekly or monthly calendar views.

Use the arrow buttons in the upper-right section of the window to move from one year (monthly view) or month (daily and weekly view) to the next. Click on a month or day to show it in the main portion of the Calendar window.

5 The day's Hotlist tasks are listed in the Hotlist Tasks section. Click a Hotlist task to view the details of the task.

If a scheduling conflict with a user or a resource/location occurs, Maximizer prompts you with a message.

6 You can view other users' appointments at once by adding the users to the **Calendar Users** list and selecting the checkbox beside the users' names. Use the **Check All** and **Uncheck All** options to quickly select all users in your Calendar Users list. To add users and resources to the calendar, you use the **Edit List** option. Click the **Edit** button to modify the list properties, including the colors that are associated with the selected users.

7 Use these buttons to hide the associated section of the Calendar window.

# Add a New Appointment to Your Calendar

You can easily schedule an appointment with an Address Book entry, other users, or yourself. The Add Appointment dialog box gathers all the information for the appointment—the date and time, the description, and even who will be in attendance.

When scheduling appointments, you can set an alarm in advance of the appointment, mark yourself out of the Peg Board, set the priority, and even send an email to the selected users, the associated Address Book entry, and yourself.

You can schedule appointments from any controlling window, in addition to the Calendar window, although the simplest ways vary slightly depending on which window is active.

Appointments can be viewed in the Hotlist window provided you select the Show Appointments option on the Hotlist's View bar (if you are using the Outlook Style window layout, you may need to drag the following windows a little to the right). Calendar appointments can be reassigned to other users through the Hotlist window.

Other users can view your appointments, or even schedule them, if you have given them access using your Preferences > Calendar/Hotlist tab. When an appointment is marked as private, even those with access to your calendar cannot see the appointment details.

### ➤ To schedule an appointment

1. In a controlling window, select an entry if you would like to schedule the appointment with a specific Address Book entry and do one of the following:

   - Right-click and choose **Schedule > Meeting**.
   - Click the **Appointment** button on the toolbar.
   - Drag the entry from the controlling window to the **Calendar** window or the **Calendar** Icon.

   – or –

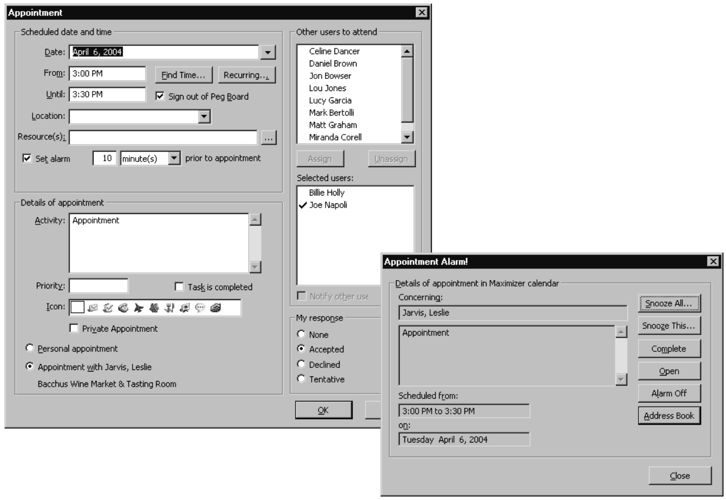
   In the Calendar window, select a date and do one of the following:

   - Right-click and choose **Add Appointment**.
   - Click the **Appointment** button on the toolbar.
   - From the **Edit** menu, select **Add Appointment**.

2. In the Add Appointment dialog box, fill in the details of the appointment. Keep the following points in mind when you're filling in the appointment details:

   - Select **Free Time** from the View menu to pick a time when all users are free. Clicking the Free Time button in the appointment dialog box displays only your schedule.
   - To schedule a recurring appointment, click the **Recurring** button. Press F1 for more information on the options associated with recurring appointments.
   - If you want this appointment to change your Peg Board status, check the **Sign Out of Peg Board** checkbox.
   - Choose a location for the appointment and specify the needed resources. These values are set in Administrator. The busy time for resources and locations include the booked time for the users that have allowed you access to their calendars. These users must be included in the Users section of the Calendar window.
   - To set an alarm, check the **Set Alarm** checkbox and specify the time prior to the appointment. See File > Preferences > Calendar/Hotlist to control the default setting for alarms.
   - To keep the appointment details private, select the **Private Appointment** checkbox. When this option is selected, even those with access to your calendar cannot see the appointment details. The appointment appears in the calendar with the activity displayed as "Private Activity".
   - Select the meeting attendees by double-clicking on a user's name or by selecting the user and clicking the **Assign** button. Check the **Notify Others** checkbox if you want a dialog box to immediately appear notifying the other attendees of the meeting; they'll have the option of accepting or declining the meeting and their responses will appear in the Appointment dialog box.
   - If you assign Ask or Always to the **Email appointment notification** option on your **File** > **Preferences > Calendar/Hotlist** tab, you, the selected users, and the associated Address Book entry will receive an email when you schedule, modify (including adding or removing attendees), or delete appointments. The Compose Email Message dialog box opens displaying the basic appointment details and allowing you to edit the email.
   - To set a priority for this appointment, set a value in the **Priority** drop-down list.
   - You can check the **Task is Completed** checkbox to immediately record the appointment as a completed appointment.

**3** Click **OK**.


Appointment
Scheduled date and time
Date: April 6, 2004
From: 3:00 PM
Find Time...
Recurring...
Until: 3:30 PM
Sign out of Peg Board
Location:
Resource(s):
Set alarm
10
minute(s)
prior to appointment
Details of appointment
Activity: Appointment
Priority:
Task is completed
Icon:
Private Appointment
Personal appointment
Appointment with Jarvis, Leslie
Bacchus Wine Market & Tasting Room
Other users to attend
Celine Dancer
Daniel Brown
Jon Bowser
Lou Jones
Lucy Garcia
Mark Bertolli
Matt Graham
Miranda Corell
Assign
Unassign
Selected users:
Billie Holly
Joe Napoli
My response
None
Accepted
Declined
Tentative
OK
Appointment Alarm!
Details of appointment in Maximizer calendar
Concerning:
Jarvis, Leslie
Appointment
Scheduled from:
3:00 PM to 3:30 PM
on:
Tuesday April 6, 2004
Snooze All...
Snooze This...
Complete
Open
Alarm Off
Address Book
Close

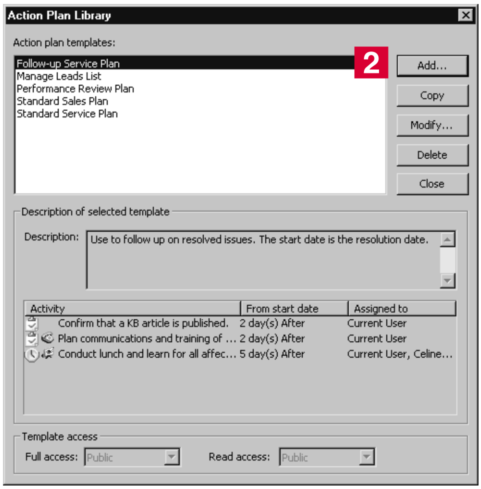
# Use Action Planner to Create Appointments and Hotlist Tasks

You can use Action Planner to create templates, which can later be scheduled to create appointments and Hotlist tasks for Address Book entries. Action Plans can apply directly to the Address Book entry or to an opportunity for an Address Book entry. You can also schedule Action Plans to create personal appointments and Hotlist tasks.

## ➤ To create an Action Planner template

1 Choose **File > Action Plan Library**.

2 Click the **Add** button.




3 In the **Add Plan Template** dialog box, enter the **template name** and **description**.

4 Click the **Add** button and choose **Appointment** or **Task** to add an activity in the template.

5 Enter the Appointment or Hotlist task details and click **OK**. You will now see the activity listed as part of the template.

Repeat steps 4 and 5 for each activity you are adding to the template.

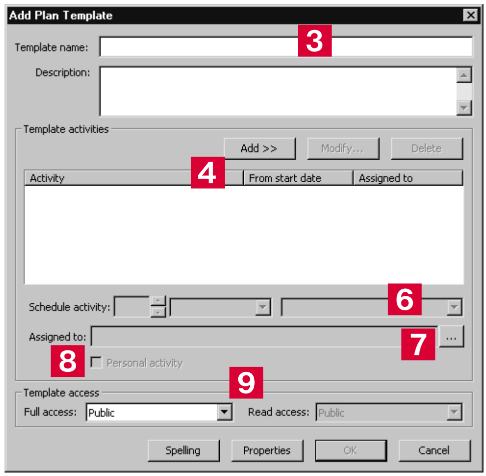
6 If you wish to modify the start date of an activity, change the information in the **Schedule activity** fields.

7 Click the ellipsis button beside the **Assigned to** field to assign an activity to another user. By default, the current user is the assigned user.

**8** Select the **Personal activity** option to mark this task as not associated with an Address Book entry.

Click the Properties button to view creation details of the plan such as the Action Plan ID number and creation date. The Properties button is also accessible when you are modifying an Action Plan template.

**9** Choose a user or group name in the **Full Access** and **Read Access** fields to make this Action Plan template accessible to only a particular user or group.




## ➤ To schedule an Action Plan for an Address Book entry

Each time an Action Plan is scheduled for an Address Book entry, a note is logged in the Notes window.

**1** To schedule an Action Plan associated with an Address Book entry, select an entry in the Address Book or Opportunities window, right-click and choose **Schedule > Action Plan** or **Schedule an Action Plan**. The Action Plan is scheduled for the associated Address Book entry.

**2** Choose an Action Plan from the **Plan template** drop-down list.

Optionally, you can modify the **Plan name** and **Description**.

The **Save As** button allows you to save a modified Action Plan as a different template.

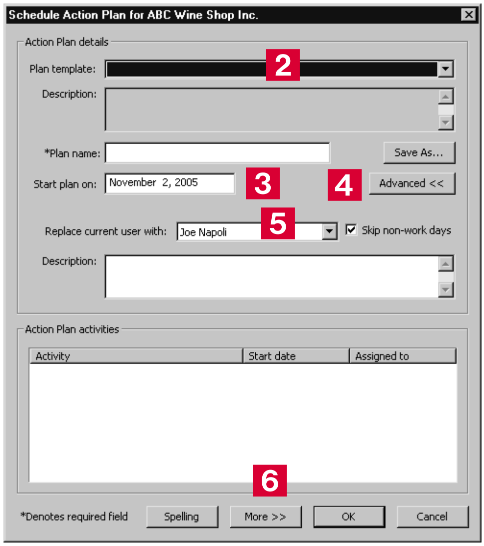
**3** Enter a start date in the **Start plan on** field. You can click inside the field and then click the ellipsis button to choose a date from a popup calendar.

**4** Click the **Advanced** button to toggle between the advanced and simplified view of the dialog box.

5 Enter the Action Plan details.

The **Replace current user with** option allows you to assign another user to all appointments and tasks included in the Action Plan. Similarly, you can assign a specific appointment or task to another user when the appointment or task is created or modified. The **Skip non-work days** option excludes days you have marked as non-work days in your Calendar preferences from the Action Plan.

6 Click the **More** button to add a new appointment or task to the Action Plan. You can also modify or delete a selected appointment or task in the Action Plan using the More button.




## ➤ To schedule a personal Action Plan

- To schedule a personal Action Plan, right-click and select **Schedule > Action Plan** or **Schedule an Action Plan** without an entry selected. The appointments and tasks associated with the Action Plan are automatically created as personal.

# View Activities

When an Action Plan is scheduled in the Address Book window, it does not appear on the Activities tab in the Opportunity window. If scheduled in the Opportunities window, it does appear in the Address Book entry's Activities tab.

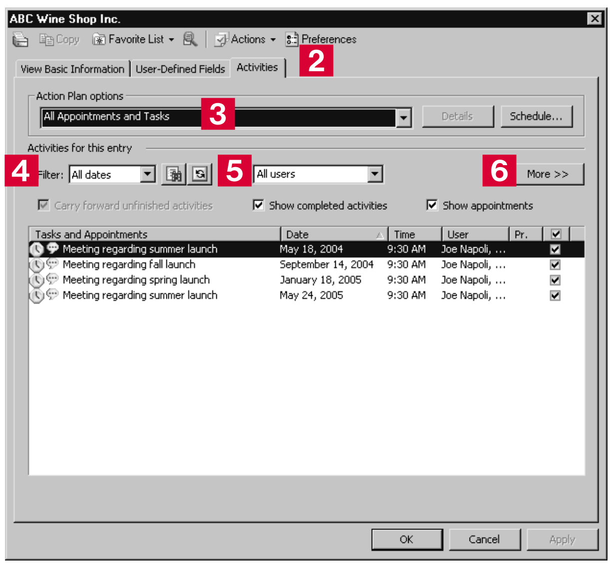
You can view activities scheduled for Address Book entries from the Address Book window. You can also view activities specific to an Address Book's opportunities in the related window.

## ➤ To view activities for Address Book entries

1. Open the related Address Book entry.
2. Click the **Activities** tab.
3. By default, all activities are displayed in the Activities tab. You can choose to view only Action Plan activities or filter the list to view only those Action Plan activities related to a specific date range, module, and/or user.
4. Further filtering can be done for the activities list by using the **Filter** drop-down and **User** drop-down lists, the **Custom Filter** button, and also the **Show Appointments** option.
5. Click the **Refresh** button to update the list of activities when you add an activity to an Action Plan.
6. Click the **More** button to add, modify, or delete an activity in a selected Action Plan.

The Details button allows you to view the details for a selected Action Plan such as the description or properties. The Schedule button allows you to schedule a new Action Plan for the current Address Book entry.

You can also view a list of all your activities by choosing **View > Activities [for Address Book entry]**. The activities shown in this dialog box are related specifically to Address Book entries, unless you have no Address Book entries in your current list, in which case the list displays personal activities.



### ➤ To view activities related to opportunities

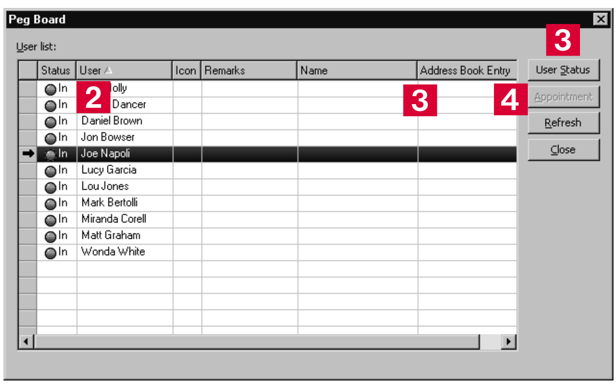
1. Open the related opportunity.
2. Click the **Activities** tab.
3. Follow the steps listed in the previous heading procedure to filter your activities list or make changes to an Action Plan.

## Check Your Co-workers Status with the Peg Board

In a medium to large office, it's not always obvious when people are in, out, or busy with an appointment. The Peg Board works with Maximizer's calendar to show you each user's current status.

### ➤ To view the Peg Board

1. Select **View > Peg Board**.
2. The status indicators denote if a user is busy or not. When a user creates an appointment, the **Sign out of Peg Board** option must be selected so the Peg Board is updated.
3. To override the calendar status, you can click on the **User Status** button to manually set a user's status.
4. You can also see other users' busy periods if they have allowed you to view their calendars (File > Preferences > Calendar/Hotlist tab). If a user has allowed others to view their calendar, you can click the **Appointment** button to view the details of the user's appointment.



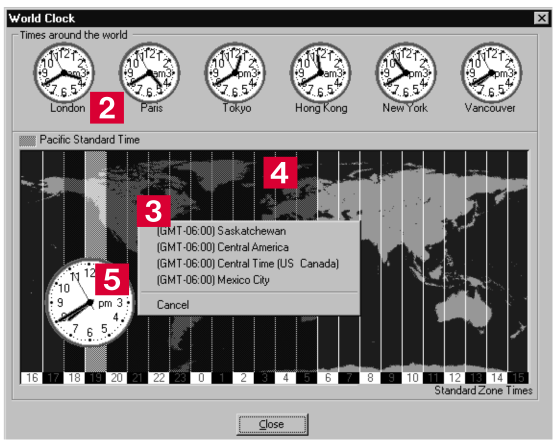
# Check the Time in Other Cities Using the World Clock

The World Clock is a utility that allows you to view the time in various locations around the world. You determine which locations are displayed. It's great if you have international dealings of any kind—from the occasional phone call to regular contact with your international clients.

You can set the time for up to six remote locations around the world by adjusting the dials shown in the Clock frame in the World Clock window.

### ➤ To use the World Clock

1. Select **Tools > World Clock**.
2. To select a time zone, right-click on one of clocks.
3. To view time zone information, click in the corresponding area of the world map.
4. The shaded area indicates night time. Right-click to turn the **Show night** option on or off.
5. Click on any time zone in the world map to view the time in the large clock.



# Sharing Your Files in the Company Library

You know the value of keeping an organized database of your marketing materials and other company collateral. Brochures, price lists, photos, magazine reviews—all of these materials should be easy to find when you need them. The Company Library provides shared access to a central library of these materials with the security offered by the Maximizer environment.

The Company Library window is divided into two panes: the left pane is a tree view, which displays the folders and files in your library; the right pane is a preview area, in which you see a preview of certain file types or type text notes.

## ➤ To share files in the Company Library


**1** Use the toolbar for common tasks, like **Open File**, **Save Note**, **Close Note**, **Find**, and **Preview**.

**2** The area in the left side of the window lists your folders and files in a tree view—much like Windows Explorer.

**3** The area in the right side of the window displays a preview of most file types. You can also view and edit notes here.

Uncheck the **Preview** checkbox to display an icon rather than a preview.

**4** Use the right-click menu to perform common tasks in the window such as adding, deleting, or renaming files.

5 Save files on your computer or a network location by right-clicking on the file and choosing **Save As**.

6 Email your document by right-clicking on the file and choosing **Email Document** or **Email Document to [current entry]**.

Press F1 in the Company Library window for more help.

The Company Library can store many different file types. Provided that your system administrator has given you access to the Company Library, you can add files, folders, and notes as either private or public entries. If you use another word processor—such as Microsoft Word or Corel WordPerfect—for your correspondence, you can even open a document from the Company Library, merge it with one or more Address Book entries, and print or send it as an email.

The easiest way to add an item to the Company Library is to right-click on the folder where you wish to place the new item, and select Add from the right-click menu. You then choose which type of item to add to the folder:

- **Document** – select this item to add a file. The file doesn't have to be a document, but the preview only works for documents.
- **Note** – select this item to add a text-only document that you can write and edit in the preview pane.
- **Folder** – select this item to add a new folder.

You can either create a new file using the associated application, or you can browse for an existing file on your hard disk drive or network. If you browse for a file, you can choose to either "link" or "embed" the file in the Company Library. Embedding is usually a better choice, as a link is only a "shortcut" to the original file, which may get moved, renamed, or may not be accessible to all Maximizer users.

Most file types are supported in the Company Library if you have the associated application installed on your computer. These include the following file types:

- .DOC and .RTF files – Microsoft Word
- .XLS files – Microsoft Excel
- .PPT files – Microsoft PowerPoint
- .HTM and .HTML
- .BMP files – bitmaps
- .TXT files – text and Company Library notes
- .JPG, .GIF and .TIF files – graphic files
- .PDF files – Adobe Portable Document Format files
- .MXD files – Maximizer Documents
- .MSG files – Outlook Email Messages

# Making Entries in Your Journal

The Journal window provides you with a location to keep personal records. Journal entries can be business activities, reference notes, and personal ideas. These entries are similar to notes, except they are not attached to an Address Book entry.

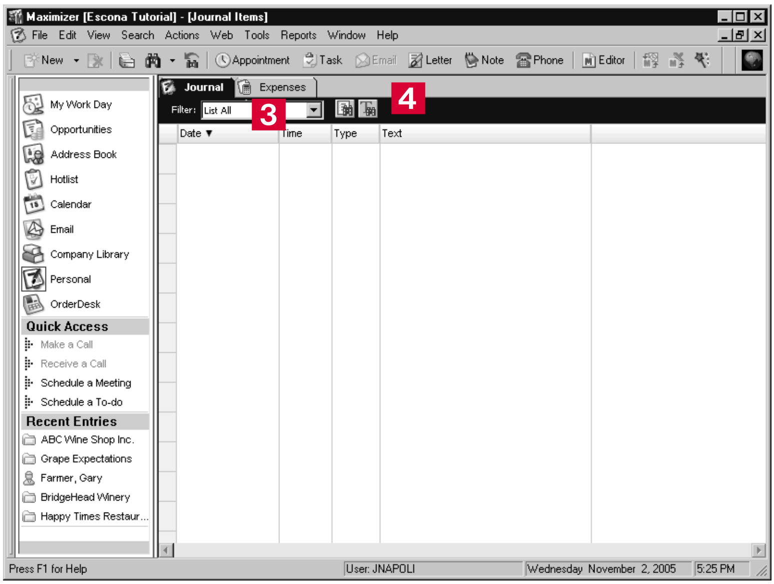
If you always want a journal entry to appear at the top of the list in the Journal window, type or select a date that is a few years in the future.

You can add journal entries up to 9,216 characters in length. By default, journal entries are stamped with today's date. You can change the date stamp if you want to add an entry for a past or future time period.

You can automatically log your Address Book activities as journal entries, and search most Maximizer note types from the Journal window, if you choose the Journal or Both options on the File > Users > [user ID] > Preferences > Logging tab.

## ➤ To use the Journal window

1. Select **Window > Journal**.
2. Right-click and choose **Add Journal Note**.
3. Filter your journal entries by selecting one of the following items from the view filter—**List All**, **Today**, **Yesterday**, **This Week**, or **This Month**.
4. To search for a note by date range or text, click the corresponding search icon.



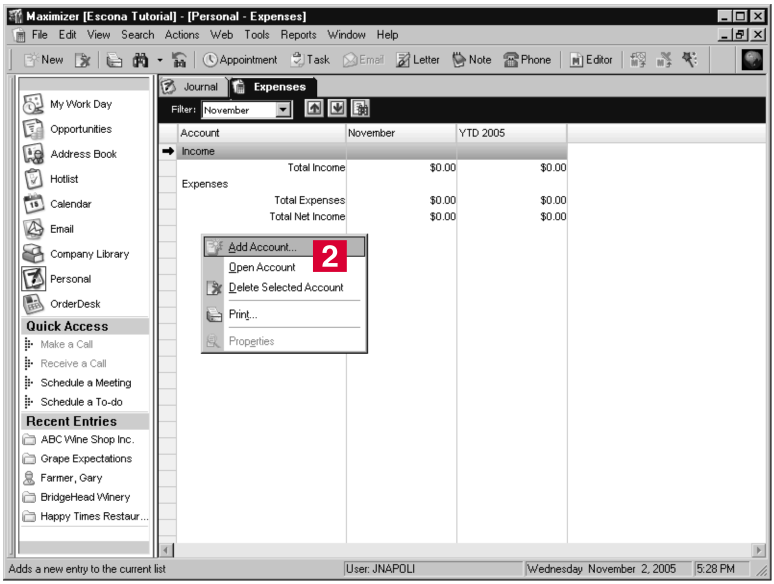
# Monitoring Income and Expenses

Expense/income entries cannot be imported from another Address Book.

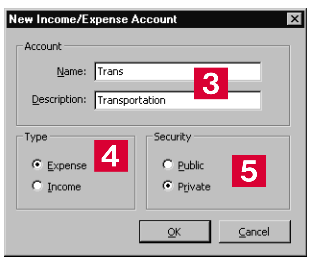
Use the Expenses window to record your income and expense items in separate accounts.

### ➤ To use the Expenses window

1. Select **Window > Expenses**.
2. Right-click in the window and choose **Add Account**.




3. Type a **Name** and **Description** for the entry.
4. Choose to make it an **Expense** or **Income**.
5. You can mark the entry as **Public** to let others see the entry.

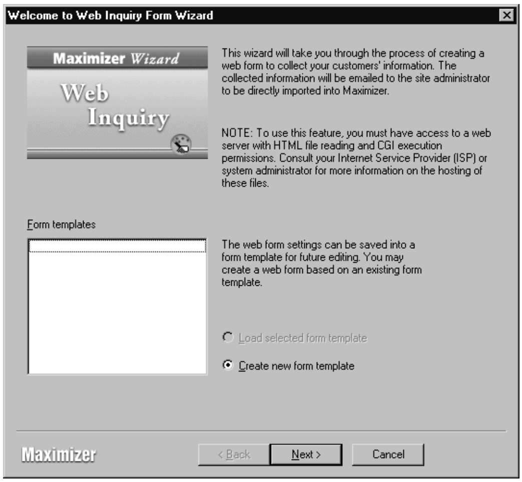



6. Then open the account, choose the day to which the expense or income applies (the current day is the default), enter the dollar amount and choose to add, subtract, or replace the amount.

# Creating Web Inquiry Forms for Your Website

Maximizer can help you create an inquiry form to collect pertinent information from your website visitors. The collected information is emailed to your website administrator—or whatever email address(es) you specify—where it can be imported directly into Maximizer as Address Book entries.

Open the Web Inquiry Form Wizard by choosing Web > Create Web Form. Follow the instructions on each of the wizard pages.




**Use the Web Inquiry Form wizard to create "data collection" forms for your website.**

Use Maximizer's Web Inquiry Form wizard for the following tasks:

- Save the web form settings as a **template** for future editing, so you can customize the form as the need arises.
- Select the **Maximizer fields**, including user-defined fields, you want to appear on the form. Information entered in the form's Last Name field, for example, is inserted into the Last Name field when importing information into Maximizer. If you have chosen a table user-defined field, a drop-down list is automatically created so customers can select available choices.
- Change **displayed field names**. For example, if you want to include in the form an existing Maximizer user-defined field called "GIC Heard About", you can choose to display a helpful label such as "How did you hear about our GIC program?".
- Designate **mandatory fields**, in addition to the last name and email address fields. If information is not entered in these mandatory fields, the customer will be notified via a Failure page.

- Create **rules to manage** when collected information is emailed to the website administrator (or whatever other email addresses you specify).
- Use HTML to customize the look of the areas above and below the **web form**; the look of the form itself cannot be customized.
- Use HTML to customize the **Success page** and the areas above and below the **Failure page**.
- **Preview** the web form and return to the respective wizard screens to make the required adjustments.

## Maximizer Web Form Requirements

If you are creating forms using the Web Inquiry Form wizard in Maximizer, you must consider some mandatory circumstances regarding your Internet Service Provider (ISP). First, your ISP must support HTML file readings and CGI execute permissions. Second, if your ISP is running a UNIX server, you must ensure the ISP installs the following Perl modules:

- CGI
- Net::SMTP
- MIME::Base64

Third, you may have to ask your ISP to install the “winqcgi.pl” file into a folder that has execute permissions.

You may also have to modify the generated web form HTML page to target the winqcgi.pl file installed by the ISP. To do so, modify the following line:

<FORM action=”winqcgi.pl” method=”post” name=”mtiform”>

to

<FORM action=”/cgi-bin/winqcgi.pl” method=”post” name=”mtiform”>

# Chapter 9
# Communicating with Your Customers

## In this chapter...

# Keeping in Touch with Your Customers

For more information on using the Maximizer Word Processor and the Documents window, see the Maximizer online Help.

Maximizer makes it easy to maintain good communication with your customers. You can send email, letters, and faxes to any of your Address Book entries. When you want to make a phone call, Maximizer will show you the number to dial, or if you have a modem, Maximizer can dial the number for you. Any communications—via mail, the Internet, or telephone—can be logged and tracked in Maximizer.

The Email window works with many popular email service provider applications, such as Microsoft Outlook and others. This means that if you already use one of these service providers, you have access to the powerful email features in Maximizer.

You can make a phone call from Maximizer by selecting the Address Book entry you want to phone and clicking the Phone button in the toolbar. As you make the call, Maximizer lets you keep notes on your conversation as it's happening.

With the Documents window, you can keep any documents or files you send to the Address Book entry, or store any file that is somehow related to your activities with the Address Book entry.

If you prefer to use another word processor, Maximizer integrates with both Microsoft Word and Corel WordPerfect.

# Designing Templates and Writing Documents

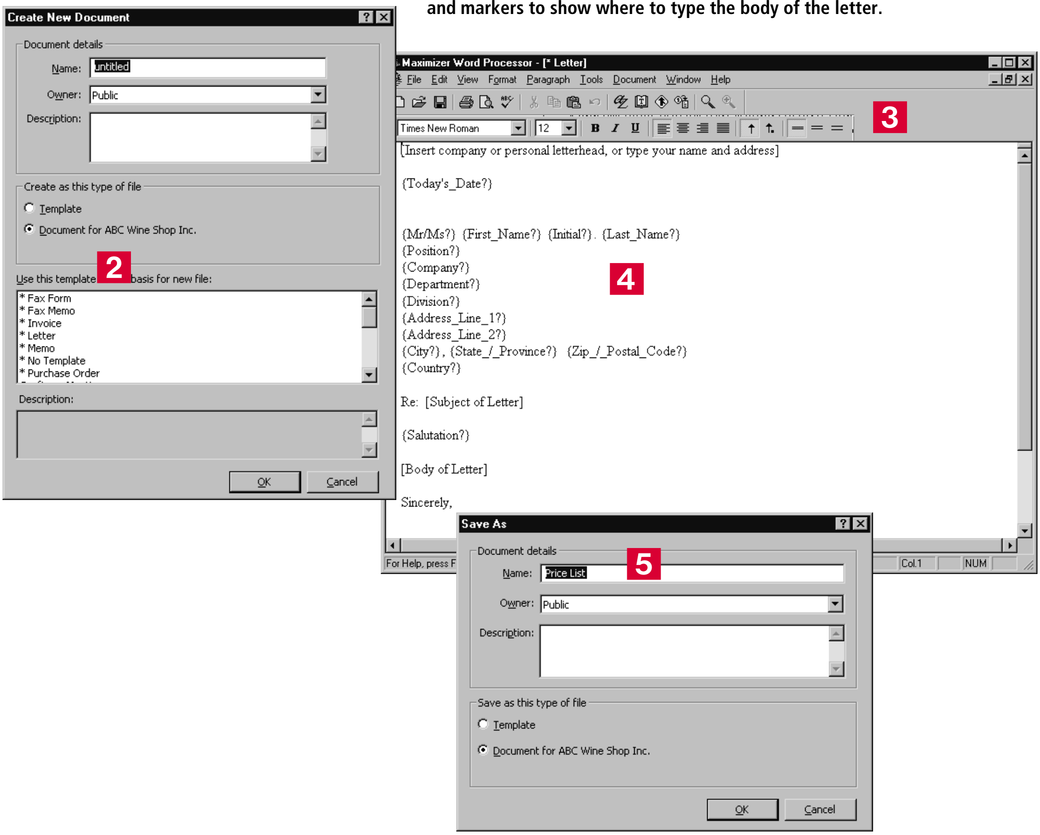
The Maximizer Word Processor is a separate application with a toolbar and menus that are similar to other commonly used word processors. You can use the Maximizer Word Processor to create documents and document templates.

### ➤ To write a document

1. Launch the Maximizer Word Processor in any of the following ways:
   - Select an **Address Book entry** and click the **Letter** button. To write a fax, select **Write a Fax** from the **Actions** menu.
   - Drag an **Address Book entry** to the **Documents** window.
   - Click the **Editor** icon on the Standard Toolbar.
   - Press **F8**.
   - From the **Tools** menu, select **Maximizer Word Processor**.
2. Select **File** > **New**. You can create the document based on the word processor's fax, invoice, letter, and memo templates, or use these templates as a base for your custom templates. You can enter the document's name now or enter it when you are saving the document.
3. Use the **toolbars** for common tasks and formatting text and paragraphs.
4. If your template has **merge fields**, the information for the selected Address Book entry—like the address—is inserted in place of the merge fields.
5. When you are finished, select **File** > **Save As** and enter a name for the document. You can also specify the owner of the document and choose whether to save it as a template. If you've already specified the name, select **File** > **Save**.

ⓘ To run a spell check, with the document or template open in the Maximizer Word Processor, place your cursor at the top of the page, and then select Tools > Spell Check or click the Spell Check button on the toolbar.

In this sample letter, the template includes merge fields and markers to show where to type the body of the letter.



## Understanding Templates and Documents

Understanding how templates and documents are used and how they communicate with each other is the key to working efficiently with this correspondence system.

### Templates

A template is a standard design meant to be used repeatedly to create new documents. Templates are generally designed to be used with a company's stationery, including default page margins, standard fonts, and merge fields.

For example, a template might be used for the following:

- Create form letters for bulk mailings to clients and prospects.
- Provide a default structure for letters and faxes.
- Provide a consistent company image.

You can create a template in the Maximizer Word Processor by designing a document with merge fields and then selecting "Template" when you save your work. When you next create a new document, you can use your saved template as the basis for the document.

### Documents

A Maximizer Word Processor document is always specific to an Address Book entry or opportunity. Typically, documents are created from one of the templates created with the word processor. A document can be a letter, a fax, a flyer, or anything you write with the word processor and send by mail, fax, or email.

### Location of Templates and Documents

When you use the Maximizer Word Processor to save your templates and documents, they are automatically stored in the Pervasive database, not the Address Book folder. Therefore, they can be viewed only through the Maximizer Word Processor and not Windows Explorer or another file management tool.

## Using Corel WordPerfect or Microsoft Word

You can use WordPerfect or Word as your word processor. Both applications are fully integrated with Maximizer.

During your Maximizer installation, choose the Custom installation option, select the listed Maximizer option, click the Change button, and then select the corresponding templates option.

### Maximizer Macro Security Setting

While some of your personal macros may require a "medium" security setting to run, Maximizer macros can operate in Word with a "high" security setting. To adjust your macro security setting, go to Tools > Macro > Security and make your selection in the Security Level tab.

After installing Maximizer, and the first time you open Word, you will be prompted to trust the Maximizer macros. Simply select the "Always trust macros from this source" option and click the Enable Macros button; the dialog box will not appear again.


### "Freezing" Merge Fields in Word

In addition to using templates from the Maximizer Word Processor, Maximizer templates can be accessed from the Maximizer tab of Word's File > New menu. The Maximizer toolbar—used for inserting Maximizer merge fields—is also available from Word. The links between Maximizer merge fields in Word documents are dynamic, which means the document information will be updated with the current Address Book entry's corresponding information.

### ➤ To insert a file in the Documents window

- In the Documents window, click the entry to which you want to attach a file. Select **Insert File** from the **Edit** or right-click menu. You can also insert an object that has been copied to the Windows clipboard by right-clicking in the Documents window and choosing **Paste Link**.

# Use Merge Fields in a Document Template

Ensure the start and end of the merge field reside on a single line. The start of a merge field is denoted by the left brace ({) character and the end of a merge field is denoted by the right brace (}) character.

Merge fields are simply place-holders in your document that can be replaced by basic Address Book entry or user-defined field information when you perform a merge. For example, in the body of a letter, you can insert a merge field for a Contact's name:

{First Name?}

When you perform the merge, the name of each recipient will display in place of the merge field. If the entry doesn't have an assigned value for the chosen merge field, the field does not display.

Merge fields are not restricted to Address Book entry information—you can insert merge fields for your own user information, opportunities, and OrderDesk information as well.

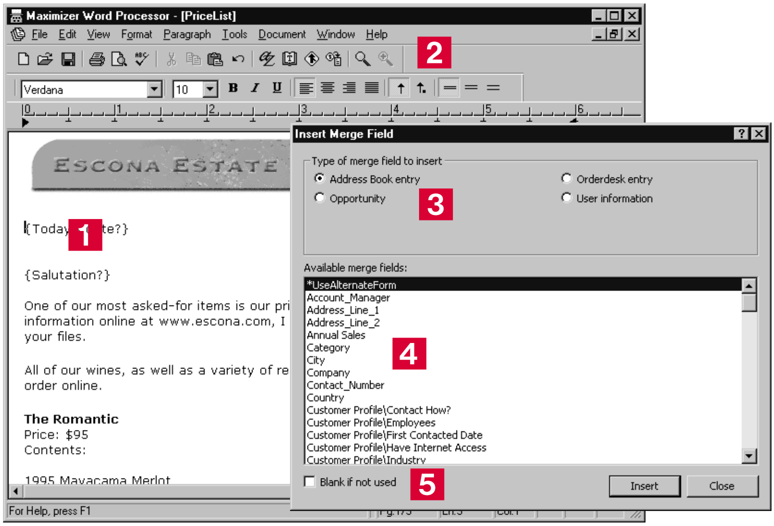
Note that you can create document templates with merge fields from Maximizer in Microsoft Word or Corel Word Perfect. Follow the steps listed below using the Maximizer toolbar embedded in the word processor to insert the merge fields. In the steps listed below, we are using the Maximizer Word Processor.

**Hold your mouse over a button to view its description. The merge field button is on the first button on the left of the toolbar.**

### ➤ To insert a merge field

1. With a document open in the Maximizer Word Processor, place your cursor where you want to insert a merge field.
2. Select **Merge Field** from the Maximizer Word Processor Tools menu, or click the **Merge Field** button on the toolbar.
3. In the Insert Merge Field dialog box, select the type of merge field you would like to insert.
4. Select a merge field from the list and click the **Insert** button. The selected merge field is inserted in the template.
5. Select the **Blank if Not Used** checkbox if you prefer. During a mail-merge, this option leaves a blank space if there is no information available for a field. (By default, if there is no information in the field, the Maximizer Word Processor simply omits the field and leaves no space; it also adjusts the position of the other merge fields accordingly.)
6. Repeat steps 3-5 for each merge field you want to add.

**7** When you are finished, click the **Close** button.



# Broadcasting Documents Using Mail Merge

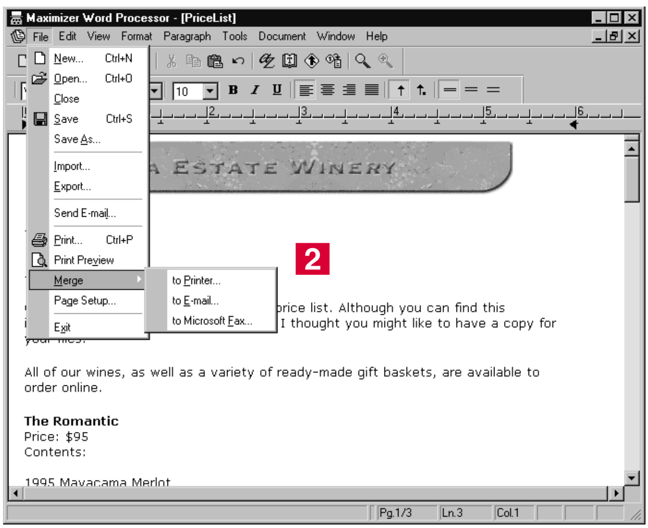
If you wish to send a letter, an email, or a fax to many recipients, the Maximizer Word Processor's mail merge is the tool to use. The merge feature allows you to send a single document to multiple Address Book or Contact entries via fax, email, or regular mail. This type of merge is called a "broadcast" merge.

Because the word processor has merge fields for your Address Book information, you can create a document with a merge field in place of a specific name. These merge fields are replaced with the recipient's information when you perform the merge and send the document.

## ➤ To send a mail merge

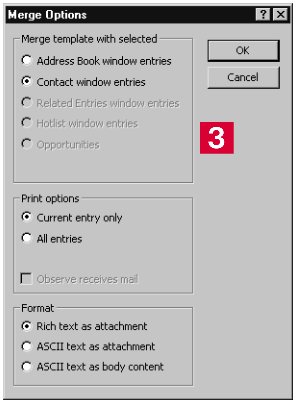
**1** To send a document in a broadcast merge, you first create a list of Address Book entries that should receive your merged document. You can create a list by searching for the appropriate entries or simply selecting entries in your current list.

**2** In the Maximizer Word Processor, select **File** > **Merge** > **to Printer**, to **Email**, or to **Microsoft Fax**. You can also send a mail merge from Microsoft Word or Word Perfect using the Maximizer toolbar embedded in the word processor to insert the merge fields.



3 Specify your merge options. Depending on what window you have active, the available merge entries vary. Click **OK** to continue with the merge.

4 Choose **Print** or **Send** to merge the document with the first entry in your selected list of entries, or choose **Send All** or **Print All** to merge the document with all of your selected entries. Click the **Skip** button to go on to the next entry.




# Sending and Receiving Email

> To send emails to Address Book entries or users when scheduling appointments, see "Add a New Appointment to Your Calendar" on page 149.

Maximizer's Email window provides you with the ability to send and receive email using your existing email system. You can email Address Book entries directly from Maximizer's main windows.

When sending email in Maximizer, you can type a note that will be added to each Address Book entry recipient. To use this functionality, note logging for email must be enabled in logging preferences.

When the Override Extended MAPI option is selected in the Preferences > Email tab, the F5 key also initiates the Deliver Now command. For information about the Extended MAPI option and the Email window in general, press F1 in the Email window.

## ➤ To send an email message

> Click the **Deliver Now** button in the Email window to immediately send and receive new emails.

> If you wish to send an email to more than 1,000 entries at a time, send the entries separately or select the entries in groups of 999 or less.

> You can search your inbox for a specific email subject by selecting Custom from the Subject drop-down list.

**1** In any of the Maximizer main windows except the Email window:

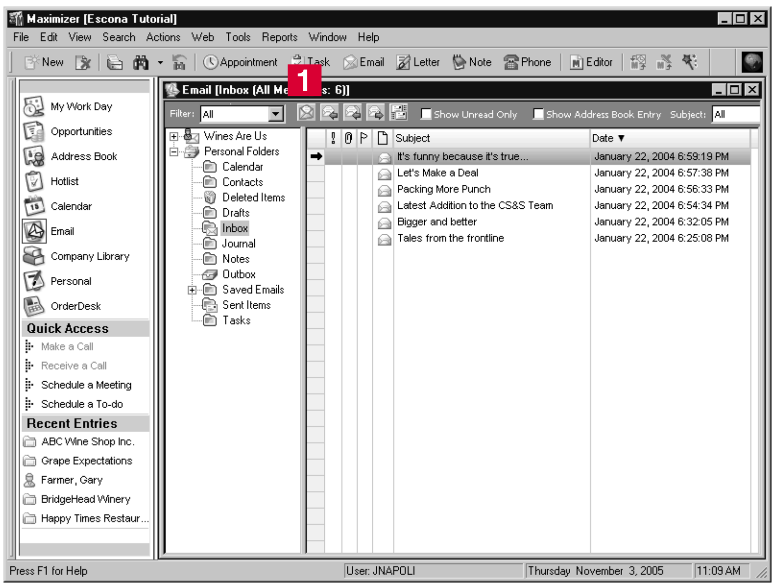
To send an email to *one* selected Address Book entry, use the **Email** button.

– or –

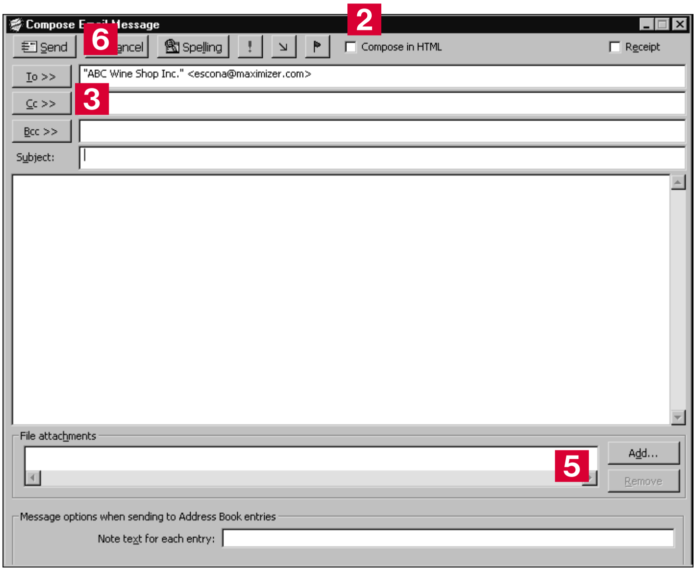
To send an email to *multiple* selected Address Book entries, select **Send Email** from the **File** menu.

– or –

In the Email window, click the **Compose** button.



**2** In the Compose Email Message dialog box, use the **Compose in HTML** option to format an email as HTML.




**3** Use the **To**, **Cc**, and **Bcc** buttons to select the recipients of the email.

If you are sending out an email to a single recipient, you have the option of choosing a **Maximizer Address Book entry** or an **Outlook** contact.

**4** Compose your email message.

The Email window supports any type of file attachment.

**5** To send a file by email, click the **Add** button under "File Attachments" in the Compose Email Message dialog box.

**6** Click **Send**.

# Keeping a Record of Your Telephone Calls

With Maximizer, you can quickly dial an Address Book entry, make a series of phone calls, receive calls, and record incoming and outgoing phone call activities in the Phone Log.

Use the Previous and Next buttons in the Phone dialog box to work through the current Address Book entry list.

Users can transfer incoming calls to any other phone extension in the phone company's system. If a note is logged for the phone call transfer (logging must be enabled for phone calls in File > Preferences), the logged note includes the transfer information.

If you are using TAPI, follow these steps to take incoming calls. See "Setting Up Automatic Dialing" on page 180 for more information on setting up TAPI.

You can put a caller on hold by clicking the Hold button. To resume a call, click the Release button.

## ➤ To phone a Company, Individual, or Contact

1. Click the **Phone** button on the toolbar and click the **Incoming** button.

   – or –

   Right-click on an Address Book entry and choose **Phone** > **Make a Call**. Alternatively, you could choose **Actions** > **Make a Call**.

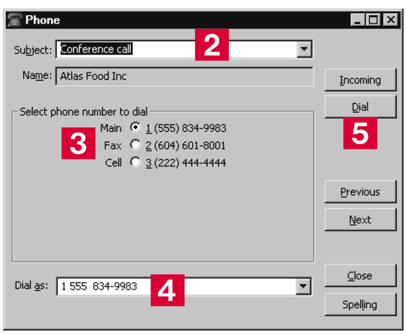
2. Select or type a **Subject** for your phone call.

3. Choose the number to dial in the **Select a phone number to dial** section of the dialog box.

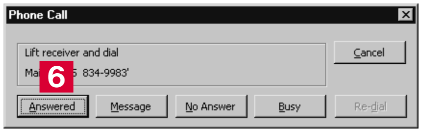
4. Choose a phone number format from the **Dial as** field.

   These formats are set up in Dialing preferences tab (File > Preferences > Dialing tab).

5. Click the **Dial** button.



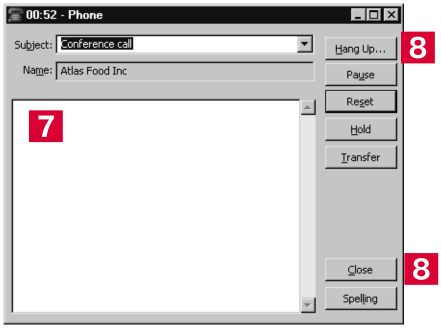
6 In the Phone Call dialog box, choose a response. For example, if the call was answered, choose **Answered**.




ⓘ In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in preferences (File > Preferences > Logging tab).

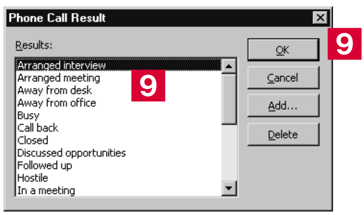
7 After clicking a response, the Phone dialog box appears. Record notes on your call as you talk.

8 Click the **Hang Up** button when you are finished, and then click **Close**.




ⓘ To later view the details of calls you made, access the Phone Log from the View menu.

9 Optionally, you can record the result of the outgoing call in the Phone Call Result dialog box. Click **OK** to close the dialog box.



### ➤ To receive a call

1. Click the **Phone** button on the toolbar and click the **Incoming** button in the Phone dialog box.

   – or –

   Right-click on an Address Book entry and choose **Phone** > **Receive a Call**. Alternatively, you could choose **Actions** > **Receive a Call**.

2. Select or type a **Subject** for your phone call.
3. Record notes on your call as you talk.
4. Click the **Hang Up** button when you are finished.
5. Optionally, you can record the result of the outgoing call in the Phone Call Result dialog box.

In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in preferences (File > Preferences > Logging tab).

### ➤ To transfer a call

1. When you have an incoming call that you'd like to transfer, click the **Transfer** button in the Phone dialog box.
2. Choose a user in the **Display name** list or enter a valid extension for your company's phone system. Note that a phone extension doesn't have to be associated with a user in the current Address Book.
3. Click **OK** to complete the transfer.

# Setting Up Automatic Dialing

If your modem can dial out in other applications, then you can use your modem in Maximizer.

If you have a modem installed in your computer, you can configure Maximizer to dial the phone for you when you make a phone call using the Phone feature in Maximizer. Before Maximizer can use your modem, you must first make sure that your modem functions correctly with your computer system, then configure your modem using the Preferences dialog box in Maximizer.

Your modem preferences tell Maximizer where your computer's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not work at all; but if you set up your baud rate incorrectly, the modem will operate, but perhaps at a slower speed.

TAPI lets you use your Telephony Application Programming Interface modem to identify and direct signals received by your communications port to the appropriate application.

### ➤ To configure your modem in Maximizer

1. Select **File** > **Preferences**.
2. In the **Dialing** tab, select **Modem** or **TAPI**.
3. If you selected **TAPI**, click the **Properties** button to configure the dialing properties for the modem, and click the **Device** button to configure the Device properties for the modem.

   – or –

   If you selected **Modem**, fill in the remaining fields.

   For a list of each control and how to fill in the field, press F1 while in the Dialing tab.
4. Click **OK**.

Your modem is now ready for use in Maximizer.

For more information on setting up dialing preferences, including documentation on using TAPI, refer to "Enabling TAPI with Maximizer" on page 98.

CHAPTER 10

# Managing Opportunities

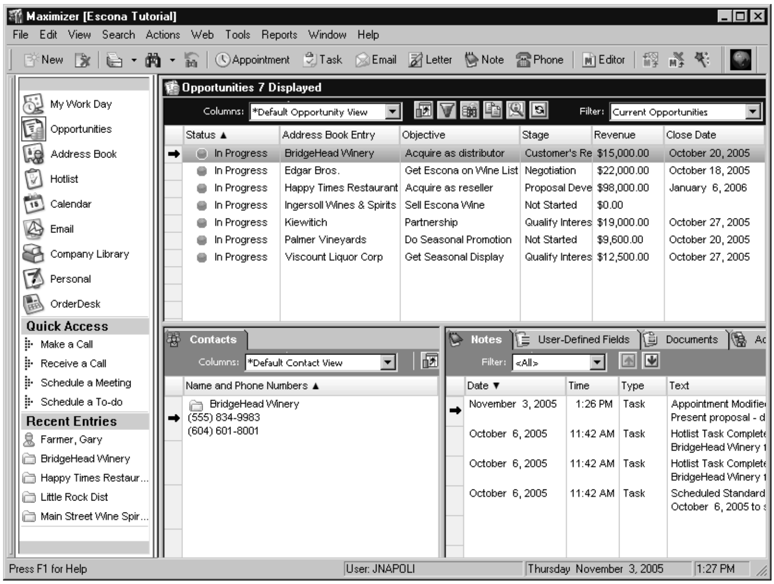
*Organize Your Sales with Opportunity Management*

## In this chapter...

# Using Opportunities

Keep the following points in mind when working with the Opportunities window:

- Use the **view bar** buttons for common opportunity tasks.
- Use the **view filter** to show all opportunities, or current opportunities.
- Double-click an **opportunity** to view or modify it.
- The **following windows** show additional information for the selected opportunity.
- Maximizer automatically creates **notes** to record opportunity activity.



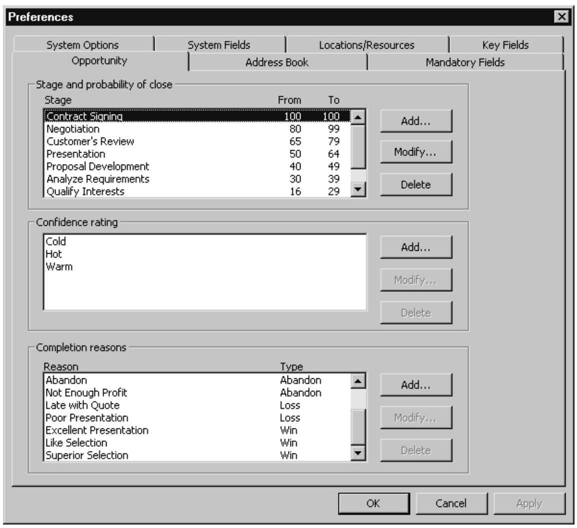
# Configuring Opportunity Preferences

Configure opportunity stages, probabilities of close, confidence ratings, and completion reasons in Administrator. These settings determine the values in the Stage, Confidence rating, Probability, and Reason (Completion details) fields of the Opportunity dialog box:

- **Stage** indicates the level of progress of the opportunity and determines the **Probability of close**.
- **Confidence rating** indicates the salesperson's opinion of the likelihood of closing the sale.
- **Completion reason** appears on the Status tab of the Opportunity dialog box. It specifies details about why an opportunity was won, lost, abandoned, or suspended.

### ➤ To configure opportunity preferences

1. In Administrator, select **File** > **Preferences**.
2. Click the **Opportunity** tab.




3. **Add**, **Modify**, or **Delete** the field values as required.
4. Click **OK** to save your changes.

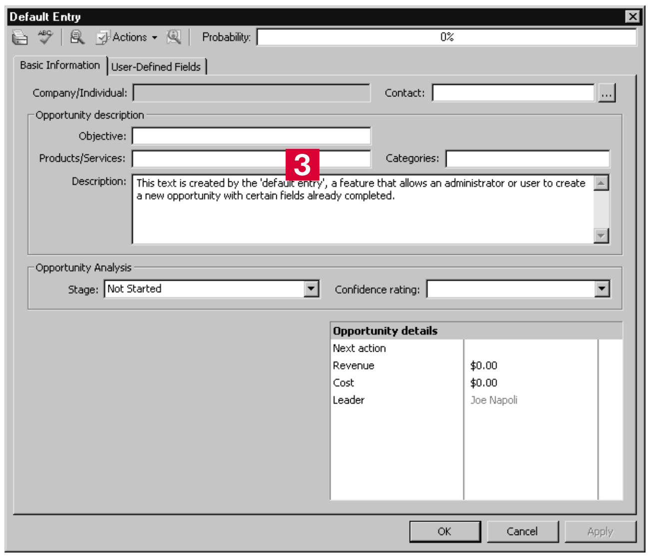
# Entering a Default Opportunity

If you frequently assign or enter the same opportunity values and want to save time by having those values pre-entered each time you create an opportunity, you can define default field values in the Default Entry for opportunities.

### ➤ To define defaults for opportunities

Default entries are user-specific so each user in the Address Book can have different default entries.

1. Open the **Opportunities** window.
2. Select **Edit** > **Default Entry**.
3. Enter the default values for any fields that you want to have pre-defined values when an opportunity is created.



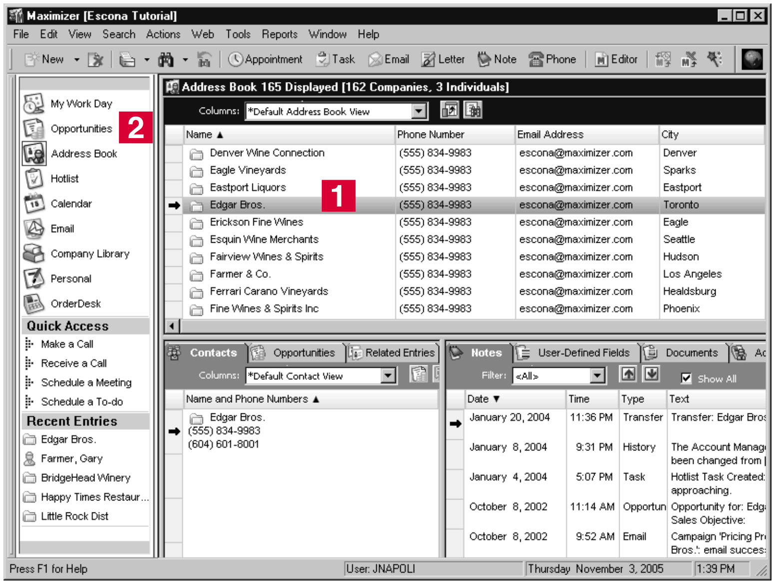

4. Click **OK** to save the Default Entry.

# Pursuing a Sales Opportunity

You enter new opportunities by selecting an Address Book entry in the Address Book window and adding the new opportunity in the Opportunities window. All opportunities have an associated Address Book entry.

### ➤ To add an opportunity

**1** Select the Address Book entry to which you want to add an opportunity.




**2** Drag and drop the Address Book entry or Contact to the **Opportunities** icon.

– or –

Select **Add Opportunity** from the **Edit** menu.

– or –

Click **Insert**.

A new opportunity dialog box opens.

ⓘ You can view associated Contact details while an opportunity is selected in the Contacts following window.

**3** Enter the opportunity **Objective**. The objective should describe the goal of this opportunity.

**4** Select the applicable **Products/Services** and **Categories**.

**5** Enter the **Description** of the opportunity.

If you have opportunity data you are upgrading from a previous version of Maximizer, ratings are transferred to the Stage field.

6 Select the **Stage** of the opportunity.

For example, if you feel confident the opportunity is a good investment of your time, you may select a value such as "Initiate Contact". The stage coincides with the Probability bar. Note that stages are set up in Administrator in the Opportunity preferences tab.

You can also enter the **Confidence rating**. This field is similar to the Stage field, however, it is not linked to the probability of close and is set based on the sales representative's feeling about the opportunity.

Mandatory opportunity fields are denoted by an asterisk.

7 Select a **Key Fields** list and then select the appropriate **Key Fields** for the opportunity.

Key Fields are important user-defined fields specific to opportunities and are defined by your administrator in the Administrator's Key Fields preferences tab. An unlimited number of Key Fields lists can be set up using up to 8 opportunity user-defined fields for each list.

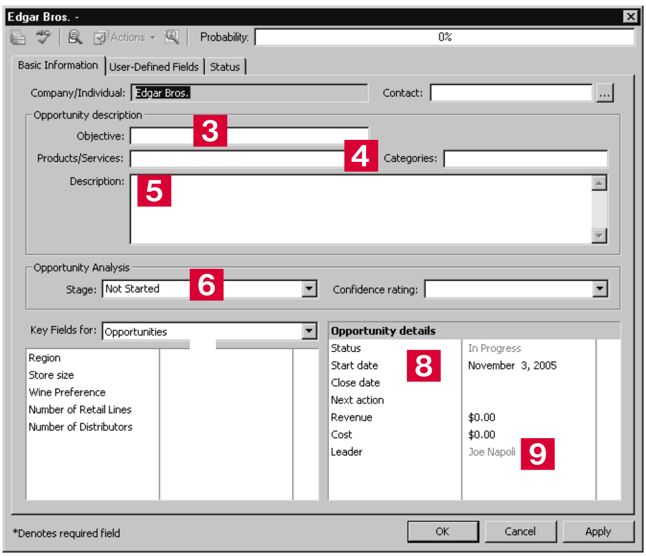
8 Enter the opportunity's details such as the **Revenue** (potential revenue). You can change this amount later, if necessary.

9 Choose the user that should work on this opportunity.

10 You can perform common tasks by clicking the **Actions >>** button from any of the opportunity dialog box tabs.

Configure stages, probabilities of close, confidence ratings, and completion reasons in Administrator (File > Preferences > Opportunity tab.)

11 Work through the remaining tabs, entering the opportunity's details including the user-defined fields and status.



# Viewing the Opportunity Pipeline Report

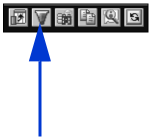
With a single click, you can view the current opportunities in the pipeline. The Opportunity Pipeline Report can also be modified—it is a Crystal Report.

### ➤ To view the opportunities in the pipeline

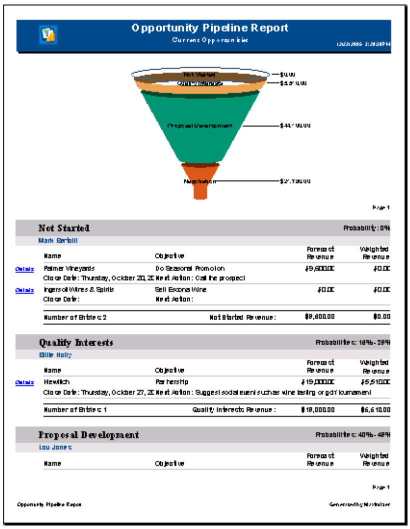
1. In the Opportunities window, click the **Display Opportunity Pipeline Report** button.

2. You are prompted for which entries to include in the report. Make your selection and click **OK**.

   The report graphically displays all opportunities you have included in the report grouped by opportunity stage.



Display Opportunity Pipeline Report



To create or modify Crystal Reports, install the full program from the Crystal Reports XI for Maximizer CD.

### ➤ To modify the Opportunity Pipeline report

1. Copy the **Opportunity Pipeline Report.rpt** file or **Opportunity Pipeline.rpt** file from the **MaData6** folder in your Maximizer program folder to your Crystal Reports working folder. You should make a backup copy of the original report file just in case you need to use the file again.
2. Open **Crystal Reports** and make your changes.
3. Save your new Opportunity Pipeline report in the **MaData6** folder where you have installed Maximizer – (e.g., ...\Program Files\Maximizer\MaData6).

For more information on reporting in Maximizer, refer to "Reporting and Graphing" on page 189.

CHAPTER 11

# Reporting and Graphing

*Report and Make Graphs on the Progress of Your Business*

## In this chapter...

# Crystal Reports

Maximizer includes Crystal Reports. The Crystal Reports viewer is installed automatically with Maximizer and is accessible from the Reports menu. To create or modify reports, install the full program from the Crystal Reports XI for Maximizer CD.

Maximizer installs a set of standard Sales reports, but you can also create your own custom reports and save them in the MaximizerReports folder (in My Documents) where they can be accessed from the Reports menu.

## Create and Access Personal Reports

In order to launch Crystal Reports from the Crystal Reports > Personal > Custom Report menu, you must be part of the Crystal Report Users security group. See "Security Groups" on page 59 for more information.

Maximizer installations create the local folder ...\My Documents\MaximizerReports. This local folder is the default location for your personal report templates.

The File > Print > Custom Reports command enables you to create new report templates, edit existing report templates, and to view reports using existing report templates. The Custom Reports command is also available from the Reports > Crystal Reports > Personal menu.

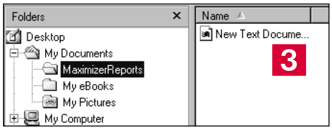
### ➤ To create and access a personal Crystal Report from Maximizer

1. Create a custom report by choosing **Create a new custom report template** from the Custom Report dialog box (Crystal Reports > Personal > Custom Report).

2. You are prompted to enter a **report name**. By default, the report is saved in ...\My Documents\MaximizerReports.

You are prompted with a login screen when previewing a new report or modifying an existing report. Enter your **Maximizer user name** and **password**.

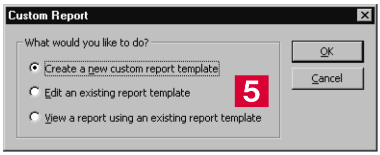
**3** Create the report in Crystal Reports and save the report file in the MaximizerReports folder on your local drive.




If you create your own folder, it appears as one of the submenu items under Crystal Reports > Personal.

**4** Select **Reports** > **Crystal Reports** > **Refresh**.

**5** To access a custom report, choose the report from **Crystal Reports > Personal**. Alternatively, you can select Personal > Custom Report from the Reports > Crystal Reports submenu and choose the **View a report using an existing report template** option in the Custom Report dialog box. If you'd like to edit the report template, choose **Edit an existing report template**.



# Printing Reports from Maximizer

Column reports are a fast way to print Maximizer information as it appears in your current list, while a Detailed report lets you print more detailed information. Other reports, such as the Notes and Name/Address/Telephone reports, allow you to print specific information about your Address Book entries and opportunities.

You can print your calendar appointments as a Calendar Book or Appointment Calendar. You can print a Personal Organizer from the Address Book, Contacts, Related Entries or Hotlist window.

You can print reports from the Reports or File > Print menus. The Reports menu gives you access to every type of Maximizer report, irrespective of the window that is open. For example, if you're in the Address Book window, and want to print an opportunity report, select Reports > Opportunities > [type of report]. The Opportunities window automatically opens and the report extracts information from the current opportunities list. The File > Print menu item prints reports strictly related to the window that's currently open.

The Reports menu allows you to print reports on the following Maximizer information:

- Address Book entries
- Contacts
- User-defined fields
- Notes
- Opportunities
- Documents
- Hotlist
- Calendar
- OrderDesk
- Journal entries
- Expenses
- Related entries
- Activities
- Phone log

The following is a summary of some of Maximizer's reports:

- **Column Report** – displays the same information you see displayed in a controlling window, such as names and addresses or opportunity information.
- **Detailed Report** – includes mailing address information, appointments, Hotlist tasks, user-defined fields, Contacts, document summaries, and notes for an Address Book entry or opportunity.
- **User-Defined Field Report** – lists the user-defined fields attached to each of your Address Book entries.
- **Forecast Analysis** – provides a summary of the probability of a successful close, the potential sales revenue, and the weighted amount associated with each active opportunity in the opportunity file.
- **Analysis Reports-Detail** – lists the opportunities by status with a revenue total.
- **Analysis Reports-Summary** – reports the number of opportunities by status with total revenue.

While all Maximizer reports can be sent to a printer, you can additionally generate .RTF (Rich Text Format), .PDF files (Portable Document Format) for most reports in Maximizer. You can also preview most Maximizer reports.

# Exporting Entries to Microsoft Excel

Microsoft Excel must be installed to be able to export entries to Excel.

You must have the “Allow transfer and import/export” Access Right enabled in your user account to be able to export entries to Excel.

Maximizer enables you to quickly and easily export selected entries to a Microsoft Excel spreadsheet from the Address Book or Opportunities controlling windows, or the Contacts, Opportunities, or Related Entries following windows.

Maximizer exports the currently selected entries for the active controlling or following window using the columns displayed in that window. If no entries are selected, it exports all displayed entries.

If the column setup includes multiple fields in a single column, each field is displayed in a separate column in Excel, with each column named after the Maximizer field name. For example, if the column setup includes a column named “Details”, which contains the fields “Contact Name”, “Next Action”, and “Last Modified Date”, the Excel spreadsheet would contain three columns named “Contact Name”, “Next Action”, and “Last Modified Date”.

If the column setup includes a table user-defined field, multiple table items are combined into a single cell in Excel. For example, if the column setup includes a column for the “Partner Interests” table user-defined field, and the “General Information”, “Press Releases”, and “Technical Bulletins” table items are selected, the Excel spreadsheet would include a column named “Partner Interests” containing “General Information, Press Releases, Technical Bulletins” in a single cell.

Note that reports exported to Excel are not dynamic, meaning they will not automatically update when changes to the exported entries are made. To update an exported report, repeat the export process.

### ➤ To export to Excel

1. Select the window to export entries from.
2. Create a list of entries or select specific entries to export.
3. Select a column setup to use for the export.
4. Click the Export to Excel button on the toolbar.

   – or –

   Right-click in the window and select **Export to Excel**.

   – or –

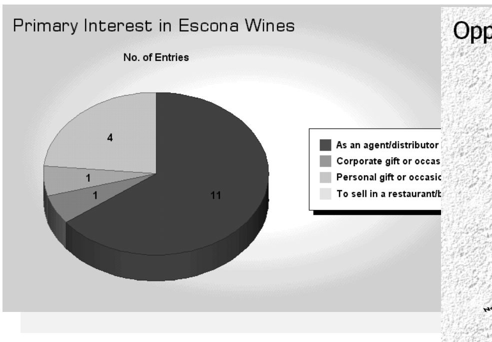
   Select **Tools** > **Export to Excel**.

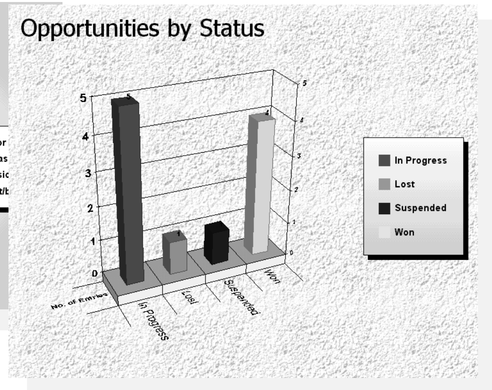
   Excel opens and displays the selected entries.
5. To keep the report, save it to your computer with a unique file name.

# Graphing and Charting with Maximizer

Creating a good presentation is about having good information and presenting it well. When you need to create attractive and meaningful graphs or charts for your presentation, and you need them quickly, Maximizer can do the job.

Maximizer gives you the ability to track your customers and find out who they are. Gathering relevant customer information is a key component of successful marketing and ecommerce initiatives. With the creation of meaningful graphs and charts on your Address Book data, you benefit from complete, detailed intelligence to evaluate the performance of your business.




When you graph your entries, you generate the graph using the entries listed in the Address Book or Opportunities window. For example, if your Address Book window currently lists all Address Book entries between A and M, only those entries will be graphed.

Once your list contains the entries you're trying to graph, click the Graphing button or choose Graphing from the Tools menu to begin the process of constructing your graph. You can graph any table or date field in your Address Book, such as City/Town, State/County/Province, Opportunity Status, to name only a few, and any table or date user-defined field.

Maximizer creates graphs and charts for all kinds of purposes. You can print your completed graph from Maximizer or save it as a high-quality image file that you can use in documents and presentations.

If you often create the same type of graph, you can save a graph template to a catalog, which you can retrieve at any time. You can even add a custom button to your Maximizer toolbar that instantly creates a graph from one of your saved templates.

The Chart wizard walks you through the steps of creating a graph or chart. You can then edit the final product to make it look attractive.

# Graph Your Address Book Entries or Opportunities

Generating a graph from your current list of entries is a simple process.

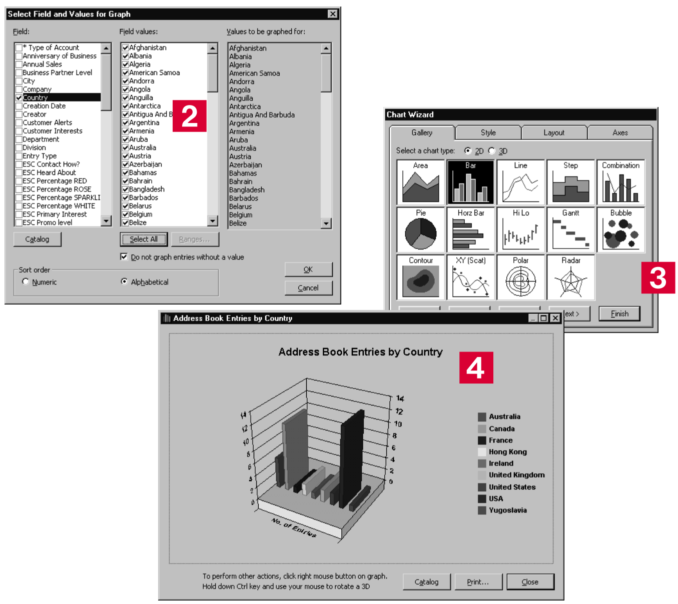
### ➤ To create a graph

**1** Create the desired list of entries in the Address Book or Opportunities window, and then click the Graphing button. Alternatively, you can select Tools > Graphing.

**2** Choose the fields and values you're graphing. For example, you could graph Address Book entries by the City/Town or State/County/Province field. Defining the values lets you narrow the range or selection of values to graph.

**3** Use the **Chart wizard** to choose the graph type, style, and layout.

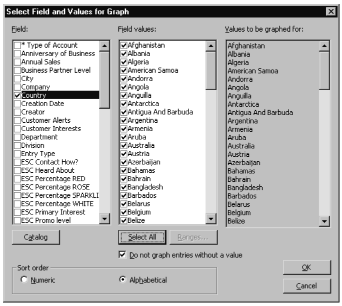
**4** Edit your graph in the **Graphing** window. You can change the appearance of your graph and edit the data. From this window, you can also save your graph as an image file.



## Select the Field and Values for Your Graph

Press F1 in the Select Field and Values for Graph dialog box to learn more about making your selection.

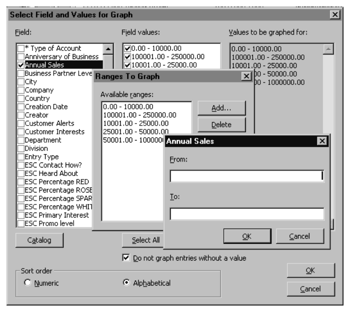
When you click the Graphing button, Maximizer prompts you to choose a field to graph. Your choice of fields depends on the type of entries you are graphing. If the Address Book window is active when you begin graphing, you choose from Address Book entry and user-defined fields, such as Company, City, or State. If the Opportunities window is the active window, you choose from opportunity fields and user-defined fields, as in the Status or Objective. You can graph any Address Book entry or opportunity field. Some field types require that you specify a range to graph, as in a range of amounts for “Annual Sales”.




**This example shows the Country Address Book entry field with all possible values selected for graphing.**

Each range you provide becomes an item on the X-axis of your graph. If you defined your ranges for the “Anniversary of Business” user-defined field as January-June and July-December, you would have two columns in a bar graph (or two wedges in a pie graph).

Maximizer lets you choose a range of values to graph for the field you select. For a table field, such as City/Town, you simply select the table items you want to include in the graph. Other field types—alphanumeric, numeric, or date fields—require you to enter a range. For example, if you select “Anniversary of Business”, you would have to provide the date ranges to include in the graph. This allows you to include only the area of interest.




**Click the Range button to specify a range (or ranges) of values for non-table fields.**

Finally, choose numeric or alphabetical as the sort order:

- **Numeric** displays charted values in numeric order, from lowest to highest. For example, if you choose a bar chart to graph the values of the City/Town field, the city/town (value) assigned to the least number of Address Book entries is shown on the left of the chart while the city/town assigned to the most number of entries is shown on the right. The legend will list the cities/towns in numeric order.

- **Alphabetical** displays charted values in alphabetical order, from A to Z. For example, if you choose a bar chart to graph the values of the City/Town field, any city (value) that starts with A is shown on the left of the chart while any city/town starting with Z is shown on the right of the chart. The legend will list the cities in alphabetical order.

## Define the Appearance of Your Graph

After you choose the field and values for your graph, the Chart wizard opens so you can define the characteristics of your graph. The Chart wizard has four tabs for defining your graph appearance:

- **Gallery** – choose flat (2D) or perspective (3D), and the chart type (Area, Bar, Pie, etc.).
- **Style** – choose the style based on the chart type you chose in the Gallery tab.
- **Layout** – specify the title, footnote, and legend settings.
- **Axes** – label your graph's axes.


These are only the basic characteristics of your graph—after the graph is generated, you can make additional changes to its appearance and even edit the graph data.

## Use Title and Footnote Merge Fields

When you save a graph to the Graph Catalog, you can insert title (header) and footnote (footer) merge fields that display information such as the current date and time, the total number of entries, and other information.

For example, inserting “date” in the title of the graph and then saving the graph to the catalog as a template tells Maximizer to display the current day’s date the next time you generate the graph.

The following fields are available for footers and headers:

- **[count]** The total number of entries graphed.
- **[date]** The date the graph is generated.
- **[login]** The user ID of the logged-in user.
- **[time]** The time the graph is generated.
- **[user]** The name of the user specified in the Users dialog box in Maximizer.

### ➤ To insert a title or footnote merge field

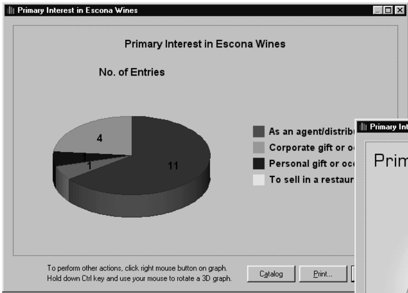
1. Start a new graph.
2. In the Chart wizard, select the **Layout** tab.
3. Enter any fields you want to appear in the **Chart Title** and **Chart Footnote** fields. Remember to surround the field with square brackets, [like this].
4. Finish creating your graph and save it to the **Graph Catalog**.

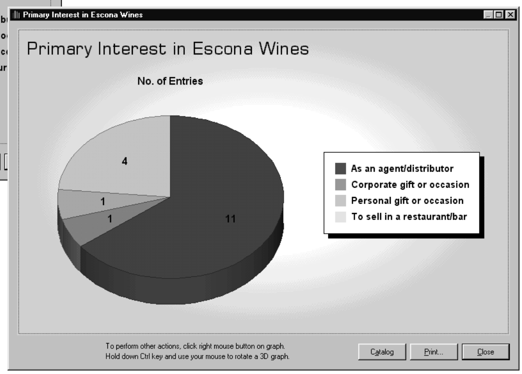
   The first time you create the graph, the field name will display, not the value (i.e., [user] instead of “Bob Smith”). The next time you generate the graph, the value will display correctly.

# Add "Zip" to Your Graph

Press F1 in the Graphing window to find out more ways to edit your graph.

At first, your completed graph may not look like much—by default, it has a plain gray background and the graph's colors are chosen for you. You can easily add your own touches to your graph by editing it in the Graphing window.



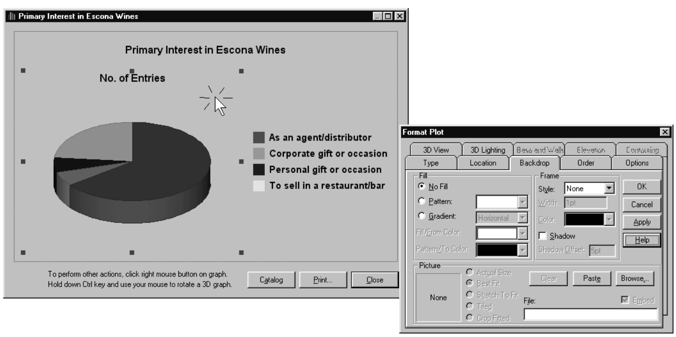




Before and after—the graph as generated by Maximizer (above) and the graph after some editing (right).

You can also right-click inside the graph to display a pop-up menu.

You can select and edit each element in the graph, such as the title, legend, or even the bars in a graph. The background, for example, can be a solid color of your choice, a gradient, or a "wallpaper" image. Simply select and double-click the element that you want to edit to display a setting dialog box.

A background color can make a plain graph look attractive. To change the background properties, double-click within the area of the graph (but not on the graph itself) so that "selection handles" appear around the graph as shown below. The Format Plot dialog box lets you make many changes to your graph.

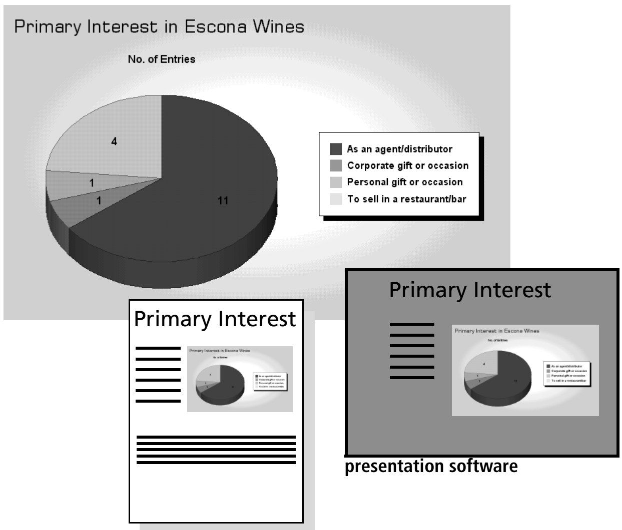


Click the Help button in the Format Plot dialog box for help using any of the settings.

You can use this same procedure to change many of the graph elements. Try single-clicking different elements to see which ones show the selection handles; if selection handles appear, you can double-click it to edit that element.

## Use Your Graph in Other Applications

If you are making a presentation, you will probably want to use your graph in handouts or in an on-screen presentation. You can save your graph as an image file that you can use in other applications, such as word processors, spreadsheets, presentation software, and more.




When you save your graph, you have a choice of two image file types: Windows Metafile or Windows Bitmap. If you think you'll have to resize the image when you insert it into your document or presentation, you might want to use the Windows Metafile format, as it is "scalable"—you can resize it without getting any jagged edges.

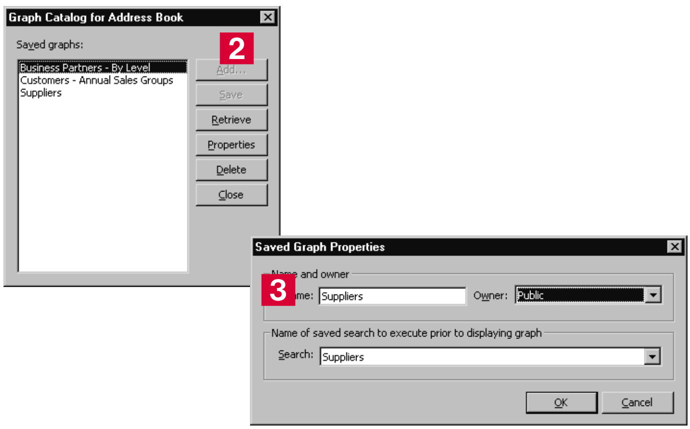
# Reuse Your Graph Settings

If you find yourself often creating the same type of graph, save yourself some time by saving the graph settings as a graph template in the Graph Catalog. After you generate the graph, use the Catalog button to save your graph template.

Graphs for Address Book entries and opportunities are stored in separate catalogs; the available catalog depends on whether the Address Book or Opportunities window is selected.

## ➤ To use the graph catalog

1. In the Graphing window, click the **Catalog** button to open the Graph Catalog.
2. Click the **Add** button to add your graph to the catalog.
3. Type a descriptive name and choose Public as the **Owner** to make the template available to all users.
4. If you have a search saved in the Search Catalog, select it in the search list to have Maximizer perform the search before generating the graph.




Once your graph template is saved to the Graph Catalog, you can use the template when you next create a graph.

CHAPTER 12

# Managing Address Book Data

## In this chapter...

# Backing up and Restoring Address Book Data

This section explains how to back up and restore Maximizer Address Book database files, which contain the majority of your Maximizer data, including Address Book entries, opportunities, etc. However, if your Address Book uses a custom dictionary or holidays, you must back up those files separately. Instructions for backing up dictionary and holiday files are on page 209.

## Backing up an Address Book

There are two types of backup procedures available:

- **Regular Backup** enables you to choose the types of files to back up. This backup procedure requires the Address Book to be closed.
- **Quick Backup** backs up the entire Address Book. You can perform a Quick Backup without closing the Address Book.

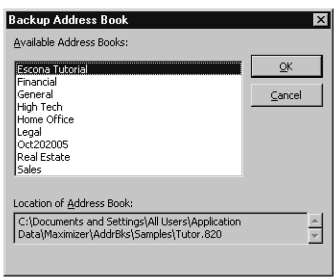
Use either of the backup commands to back up the Address Book. A backup checks and cleans up the data, and compresses it up to 80 per cent. Allow a few minutes to back up a large Address Book folder.

### Regular Backup

➤ **To perform a Regular Backup**

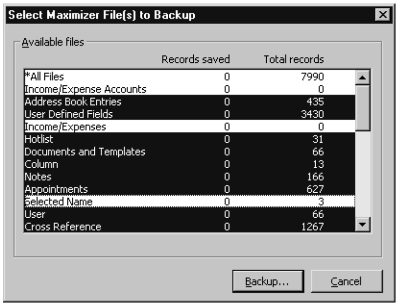
1. Close the Address Book and ensure the Address Book is not being used by any other users.
2. In Administrator, select **Utilities** > **Backup Address Book**.
3. Select the Address Book to back up, and click **OK**.

To verify currently logged in users, open the Address Book in Administrator, and select Reports > Current Users.

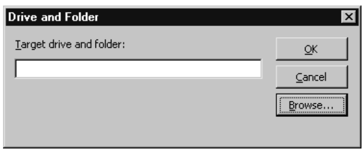


**4** Enter the MASTER user's password, and click **OK**.


**5** Select the Maximizer files to back up, and click **Backup**.

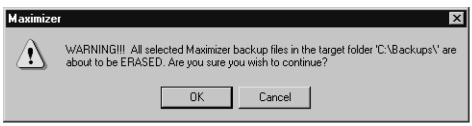



**6** Click **Browse**, and select the folder for the backup files.




Pervasive backup files have a .SAV extension, and Maximizer Pervasive database files have a .MAX extension.

**7** Maximizer prompts you that all Maximizer backup files in the target folder will be erased. Verify that it is okay to overwrite those files, and click **OK**.




Maximizer starts backing up the files.

**8** When the backup is complete, click **Close** to exit the dialog box.

## Quick Backup

The Quick Backup feature enables you to perform a fast backup of any open Address Book. Quick Backup automatically backs up all entry types, rather than asking you to specify which entry types to back up. The advantage to using Quick Backup is that you can perform frequent backups without closing the Address Book.

### Backing Up to the Current Address Book

If you choose to save the backup to the current Address Book folder, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files. Each backup is saved within Backup using the current date as the folder name.

As an example, if you perform a Quick Backup on March 23, 2006 the backup files would save to the following folder:

C:\MaxData\AddrBks\<AddressBook>\Backup\20060323.01\

The ".01" is added to the folder name to differentiate between backups from the same day, so a second backup on the same day would be saved to the following folder:

C:\MaxData\AddrBks\<AddressBook>\Backup\20060323.02\

In this way, you can save many backups and have them dated for easy retrieval. Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

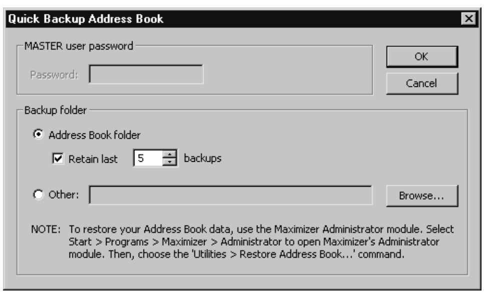
### Backing Up to a Specific Location

If you do not want to save the backup files in the Address Book folder as described above, you can specify a folder when you start Quick Backup.

## ➤ To perform a Quick Backup

**1** Open the Address Book to back up.

**2** Select **File** > **Quick Backup**.




**3** Enter the MASTER user's password.

If this box is disabled, continue to the next step.

4 Select the backup folder:

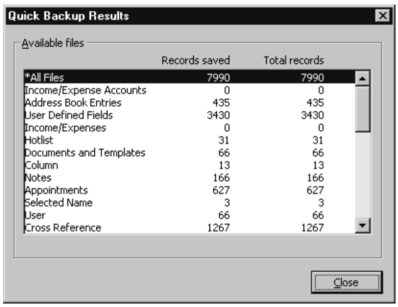
**Address Book folder** saves the backup files to the same location as the Address Book folder.

**Other** enables you to save the backup files to a location other than the Address Book folder.

5 If you selected Address Book folder, specify the number of previous backups to retain.

6 Click **OK** to begin backing up.

Depending on the size of the Address Book folder, the backup could take several minutes or several hours. When the Quick Backup is complete, a summary of the backup appears.




7 Click **Close** to exit the dialog box.

## Restoring an Address Book from a Backup

If you have lost or damaged your Address Book, you can restore it to an earlier version that you previously backed up. You can restore an entire Address Book at once or only selected files.

When you restore, you copy the backup file(s) from another folder or removable storage media into the working folders on the hard disk, replacing all existing data.

Sometimes, you may also want to do a restore to “pack” the data. For example, if you delete six months of old Hotlist entries, the data files are still quite large. A backup followed immediately with a restore compresses this data and frees up disk space.

### ➤ To restore an Address Book

This procedure replaces the existing Address Book data with the backup data.

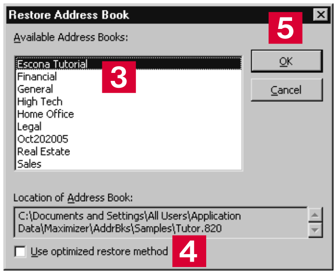
1 In Administrator, close the Address Book.

2 Select **Utilities** > **Restore Address Book**.

3 Select the Address Book to restore.

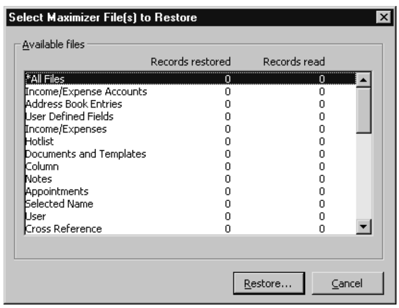
4 You can select the **Use optimized restore method** option, which speeds up the process of restoring the Address Book. However, this option requires more memory.

5 Click **OK**.

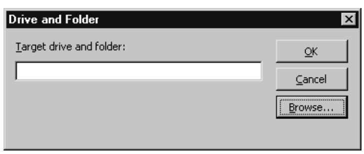



6 Enter the MASTER user's password, and click **OK**.


7 Select the Maximizer file(s) to restore, and click **Restore**.




8 Click **Browse**, select the folder containing the Address Book backup files to restore, and click **OK**.




9 Maximizer warns you that it will destroy current Maximizer data files by restoring from a backup. Click **OK** to continue.

Maximizer restores the files from the backup.

## Backing up the Dictionary and Holiday Files

The Maximizer dictionary and holiday files are not backed up as part of the Address Book backup procedure(s) described previously. Therefore, if you have customized the dictionary or holidays, you need to back up those files separately, especially before upgrading or re-installing Maximizer.

To back up the dictionary and holiday files, copy them from the following location and paste them to another location, preferably the same location where your Address Book is backed up.

The user dictionary file is unique to each Maximizer workstation, so you will need to back up this file for each workstation.

User Dictionary File Location:

By default, the Maximizer program folder is C:\Program Files\Maximizer. If Maximizer was installed in a different folder, then change the path accordingly.

...\Program Files\Maximizer\MaData6\Userdict.lex

Holiday File Location:

...\Program Files\Maximizer\MaData6\Mxzhol.nam

# Verifying and Recovering an Address Book

You can verify and recover only one Address Book at a time.

Address Book verification enables you to quickly identify and resolve invalid and orphan items in your Address Book. You should always run Address Book Verification and Recovery after upgrading or restoring an Address Book. Also, if database views have not been created for any user-defined fields and are needed for generating reports, use Address Book Verification and Recovery to create the missing database views.

Address Book Verification and Recovery identifies the following Address Book items.

| Address Book Item | Description |
|---|---|
| Broken Company Library links | Company Library links that try to connect to a missing document (link exists but the document is missing). |
| Orphan Company Library links | Company Library links that link to a missing Company Library folder (document exists, link exists, but the Company Library folder is missing). |
| Orphan Company Library documents | Company Library documents not listed in the Company Library folders (document exists but the link is missing). |
| Invalid Address book records | Company records containing personal information about an Individual or Contact. |
| Invalid Document records | Documents whose Owner field contains invalid characters or values. |
| User-defined fields that do not have associated database views | User-defined fields for which a database view has not been created. |
| Invalid Table UDF Item records | Table user-defined field items that have the wrong type (Company, Individual, Contact, etc.). |
| Invalid/orphan Table UDF values | Table user-defined field values that reference non-existent table items. |
| Orphan Link Records | Opportunities that do not have a related Address Book entry. |

To see recovered entries, you must log in as MASTER or have rights to open other users' entries.

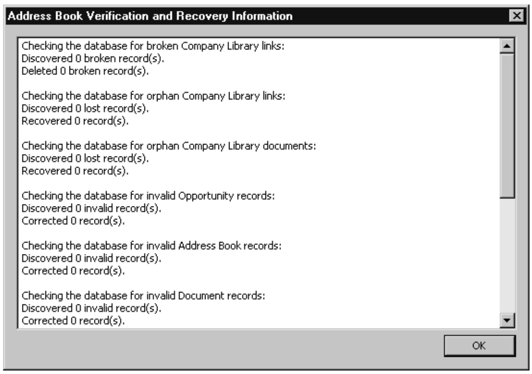
When you choose to "recover" the Address Book, Maximizer transfers recovered Address Book entries into a single entry called "Recovered on [date of recovery]". You can then view the recovered entries and either delete or move them as needed.

## ➤ To verify an Address Book

1. In Administrator, open the Address Book.
2. Select **File** > **Address Book Verification**.
3. Choose either the **Verify Only** or **Verify and Recover** option, and click **OK**.


If you select Verify Only and Maximizer detects invalid records, it prompts you to recover them.

Maximizer runs the Address Book verification process, as well as the recovery process if you selected the second option. When it is complete, you see the Address Book Verification and Recovery Information dialog box, which contains a summary of each verification performed and the results of the verification.




4. If you selected the **Verify and Recover** option, open the Address Book in Maximizer, and view the **Recovered on [date]** Address Book entry. You can then delete or move the recovered entries.

# Exporting Data from Maximizer

You can export Address Book entries from Maximizer only, not Administrator.

## Exporting Address Book Entries

Exporting Address Book entries creates a text file or XML file containing information from the current Address Book. It exports any Companies and Individuals selected in the Address Book list. If no Address Book entries are selected, it exports all Companies and Individuals currently displayed in the list.

### XML Format

The unique ID is exported with each Company or Individual, but unique IDs for contacts are not exported.

By default, exporting Address Book entries in XML format exports name, address, phone number, email address, and company details information from the Basic Information tab of the selected Companies and Individuals (or all entries in the list if none are selected). You can easily import this file into another Address Book.

You can optionally export the following additional information:

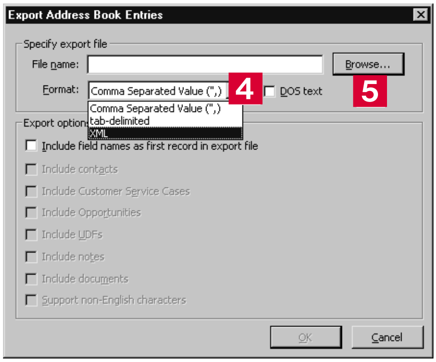
These options are available for XML export only, not CSV or tab-delimited exports.

- **Include contacts** exports the contacts associated with the exported Address Book entries.
- **Include Opportunities** exports Opportunities associated with the exported Address Book entries.
- **Include UDFs** exports all Address Book user-defined fields associated with the exported Address Book entries, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time required for the export process, and not selecting this option improves speed.
- **Include notes** exports notes associated with the exported Address Book entries, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported Address Book entries, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported XML file to Unicode format, which is required for languages using more than one byte per character, such as Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

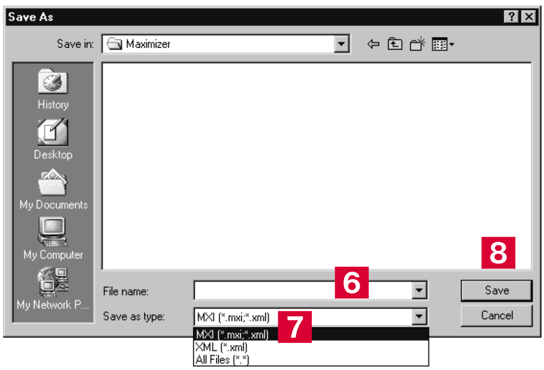
### ➤ To export Address Book entries in XML format

1. In Maximizer, open the Address Book window.
2. Select the Companies and Individuals to export. If you don't select any entries, Maximizer will export all entries currently displayed in the Address Book list.
3. Select **File** > **Export Address Book entries**.

   The Export Address Book Entries dialog box opens.

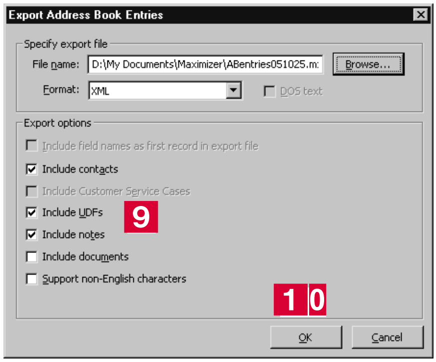



4. From the **Format** drop-down list, select **XML**.
5. Click the **Browse** button.




6. Specify the destination location and **File name** for the exported file.
7. In the **Save as type** drop-down list, select either **MXI** or **XML**.

8 Click **Save**.




9 Select any of the **Export options**, as needed. Each of the options is described before this procedure.

10 Click **OK**.

Maximizer exports the Address Book entries and additional data as selected in the options to the specified file.

## Comma-Separated Values or Tab-Delimited Format

User-defined fields that contain more than one item are not supported in a CSV or tab-delimited export. Use XML export instead.

Exporting to comma-separated values (CSV) format creates a file with a .CSV extension, which is readable by spreadsheets such as Microsoft Excel and many other programs.

Exporting to tab-delimited format creates a text (.txt) file with tabs separating each field value. This file is readable by any program that supports .txt files.

Exporting to these formats exports selected Companies and Individuals in the Address Book, but you do not have the option of exporting Contacts.

Unlike XML Format, exporting to CSV and tab-delimited format enables you to specify individual fields to export, including Address Book user-defined fields.

You can also export Notes associated with the Companies or Individuals. You have the option of exporting all notes or most recent notes.

### Selecting Fields for Export

When exporting to CSV or tab-delimited format, you must select which fields to export, and in which order. The Select Fields for Export dialog box has two columns: the left column lists the Address Book entry basic fields, user-defined fields, and two fields for notes; the right column is initially blank. Select the fields to export from the left column and add them to the right column.

The order of fields in the right column is the order in which they will be exported. If you need to change the order of any fields, select each one and click Remove to delete it from the list; then, in the right column, select the field after which you want to place another field. Fields added to the right column appear directly below the field currently selected in the right column.

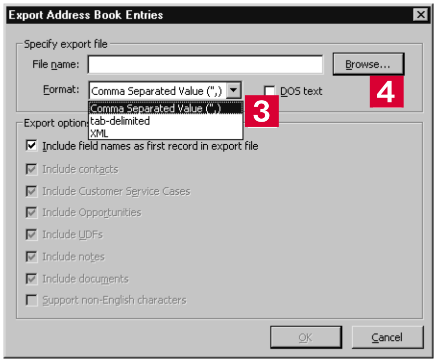
Once you have established the order of export fields as you would like it, you can click the Catalog button to save the export list for future exports. In the Export Catalog dialog box, click Add to create a new saved export list, or click Save to overwrite an existing export list. The Retrieve button opens an existing export list.

## ➤ To export Address Book entries in CSV or Tab-delimited format

1 In Maximizer, open the Address Book window.

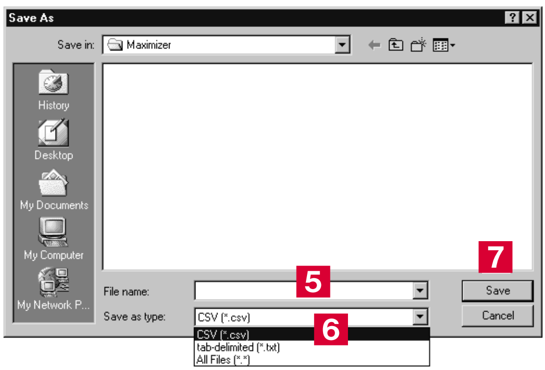
2 Select **File** > **Export** > **Address Book entries**.

The Export Address Book Entries dialog box opens.




3 From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.

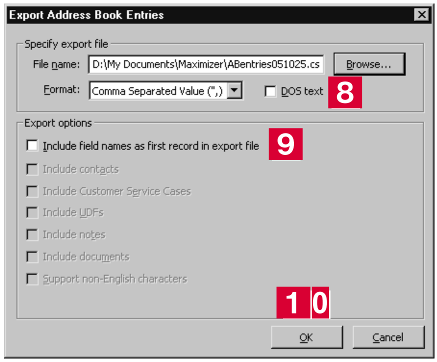
4 Click the **Browse** button.




5 Specify the destination location and **File name** for the exported file.

6 Verify that the format you selected previously appears in the **Save as type** field.

**7** Click **Save**.



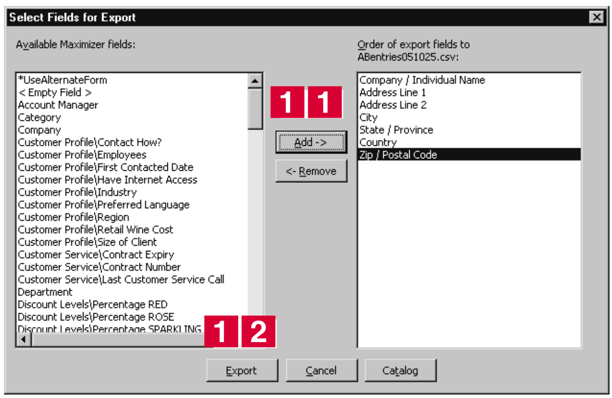

**8** Select the **DOS text** checkbox to export data that is in DOS standard ASCII.

If the data is in ANSI ASCII (Windows default), do not select the checkbox.

**9** If you want the field names to be exported as the first record in the exported file, similar to a headings row, select the **Include field names as first record in export file** checkbox.

**10** Click **OK**.

The Select Fields for Export dialog box opens.




For more information about using the Select Fields for Export dialog box, refer to the section before this procedure.

**11** From the **Available Maximizer fields** list, select the fields to export by selecting each field and clicking **Add**.

– or –

Click **Catalog** to retrieve a previously saved export list.

**12** Click **Export** to begin the export process.

# Importing Address Book Data from MXI or XML Files

You can use Administrator or Maximizer to import Address Book entries and other data from MXI (Maximizer XML Interface) or XML Files.

After importing Address Book entries into Maximizer, you can identify the imported records by selecting **View** > **Favorite Lists** in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

## Importing MXI or XML Files Using Advanced Import

For more control over importing MXI files, or to import XML files, use the Advanced Import method described below, which enables you to specify a number of preferences about how to import the file.

### ➤ To import from an MXI or XML file

Always back up the Address Book before importing.

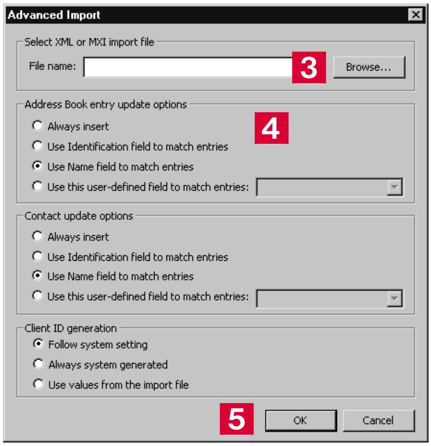
1. Open the Address Book to import into.
2. Select **File** > **Import** > **Advanced Import**.
3. For the **File name** field, click **Browse** and locate the .xml or .mxi file to import.

   Once you have selected the file to import, Maximizer fills in the Log File field automatically.

For detailed information about any of the fields in this dialog box, press F1 while the dialog box is active.

4. Specify any import options in the other group boxes, or just use the default values.

5 Click **OK** to begin the import.




Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.

6 Click **OK** to close the message box.

# Unattended Import of MXI or XML Files

An alternative to Advanced Import is an unattended import, which you can initiate by double-clicking the MXI or XML file or by passing parameters to the Maxwin executable (MaxWin.exe) through a command-line interface. When using unattended import, you may choose to specify some of the import preferences within the MXI or XML file itself.

## Importing MXI or XML Files by Double-Clicking

➤ **To import an MXI or XML file by double-clicking**

1. Locate the MXI file on the computer.
2. Double-click the file.
3. Select the Address Book to import into, and click **Open**.
4. Enter your **User ID** and **Password** in the Login dialog box, and click **OK**.

   Maximizer imports the data, and then displays a message identifying the number of records inserted, updated, and failed for each record type.
5. Click **OK**.

   Maximizer displays a message with the name of the Favorite List, which lists the imported Address Book entries.
6. Click **OK** to view the Favorite List.

## Importing MXI or XML Files from the Command Line

To import an MXI or XML file from a command line, call Maxwin.exe with the following command-line syntax:

The command-line syntax shown here uses sample parameter values.

```
Maxwin.exe /DATABASE "EsconaTutorial" /USERID "JNAPOLI"
/PASSWORD "maximizer" FILE="d:\ABentries051013.mxi"
```

Keep the following points in mind:

- Only one space is allowed after the DATABASE, USERID, and PASSWORD keywords.
- Values must be surrounded by double quotation marks.
- The equal sign (=) after the FILE keywords must NOT have space before or after it.
- The FILE parameter must be the last parameter.

# Importing Data from Other File Formats

You can use Administrator to import Address Book information from other sources, such as ACT!, GoldMine, or Outlook.

After importing Address Book entries into Maximizer, you can identify the imported records by selecting **View** > **Favorite Lists** in the Address Book window. A list of imported Address Book entries is stored in a favorite list named according to the file format and import date and time.

Administrator provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **Address Book Entries**: This method imports entries from a CSV (comma-separated values) or tab-delimited text file that is created when you export from Maximizer or another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts. For more information, refer to “Two-Tier Import” on page 224.
- **ACT! or GoldMine Database**: Importing an ACT! or GoldMine database is straightforward because Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. Refer to “Importing Data from ACT! and GoldMine” on page 229.
- **Other Contact Manager Database**: This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. For more information, refer to “Importing from Other Contact Managers” on page 226.

Use the following tables to determine which import method to use.

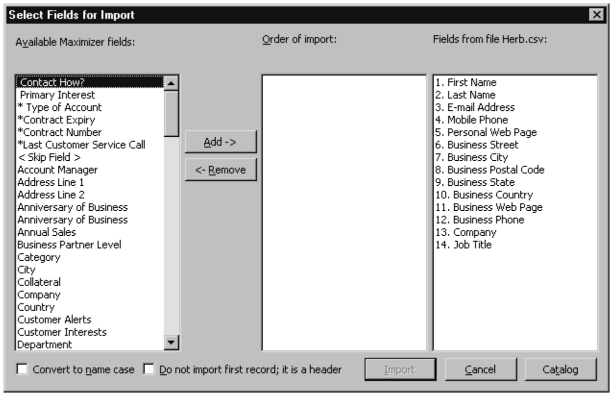
| File Type | Import Method(s)<br>(File > Import > ...) |
|---|---|
| ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (*.dbf) | ACT! 6.0 or 2004 or earlier |
| ACT! 2005/2006 or ACT! Premium for Workgroups 2005/2006 | ACT! 2005/2006 and ACT! Premium for Workgroups 2005/ 2006 |
| GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (*.dbf) | GoldMine 6.5 or earlier |
| GoldMine 6.7 Corporate Edition | GoldMine 6.7 Corporate Edition |
| Organizer 1.x (*.org) | Other Contact Manager Database |
| Delimited (*.txt, *.prn) | Other Contact Manager Database |
| Comma Delimited (*.csv)<br>Tab Delimited (*.txt) | Address Book Entries |
| Clipper Summer '87 (*.dbf) | Other Contact Manager Database |
| Clipper 5.x (*.dbf) | Other Contact Manager Database |
| dBase III, III+, IV (*.dbf) | Address Book Entries |
| dBase V (*.dbf) | Other Contact Manager Database |
| Visual dBase 5.x (*.dbf) | Other Contact Manager Database |
| FoxBase/FoxBASE+ (*.dbf) | Other Contact Manager Database |
| FoxPro 1.x, 2.x (*.dbf) | Other Contact Manager Database |
| Visual FoxPro 3.x (*.dbf) | Other Contact Manager Database |

# Field Mapping

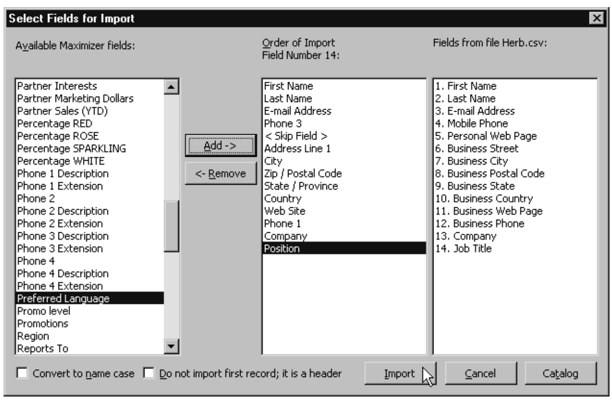
When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

When importing some types of data files, you need to map (create an association between) the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called “Company” in Outlook and “Company or Individual” in Maximizer.

When you are importing a file type that requires you to map fields, a dialog box similar to the following opens.




For each field in the source file (shown in the far right column), select one of the available Maximizer fields and, click **Add** to map the fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select **<Skip Field>** from the list of Maximizer fields. When you have finished mapping the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column, as illustrated below.



# Two-Tier Import

If you import a Company record, and an existing Company record in the database has an identical "Company" field, then the records are considered duplicates, and Maximizer will not import the duplicate Company record. However, Maximizer will import duplicate Individual and Contact records.

Many contact management programs keep two types of address book entries:

- Companies
- Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

- Companies/Individuals
- Contacts (associated with a Company or Individual)

The Import Address Book Entries function enables you to perform a two-tier import. In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

Two-tier importing is only applicable to comma-separated value files, tab-delimited files, dBase III, III+, or IV, or XML files using the File > Import > Address Book Entries command.

### ➤ To import Address Book entries (two-tier import)

Always back up the Address Book before importing.

User-defined fields containing more than one available item are not supported in a CSV (comma-separated values) import. Use the Advanced Import feature or MTI (Maximizer Transfer Interface) as an alternative.

1. From the **File** menu, select **Import** > **Address Book Entries**.

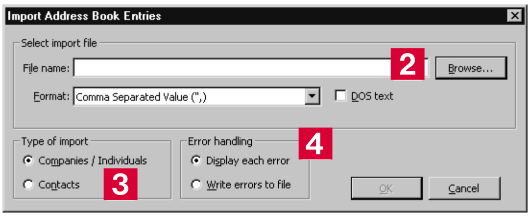
   The Import Address Book Entries dialog box opens.

2. Click **Browse** and locate the file to import.

3. Select the **Companies / Individuals** option to import all records in the source file as Company or Individual Address Book entries.

   (After you complete this procedure, repeat it a second time to import the Contacts. If you choose not to do a two-tier import, just select either **Companies / Individuals** or **Contacts**.)

4. Click **OK**.




The Select Fields for Import dialog box opens.

**5** In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**.

Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

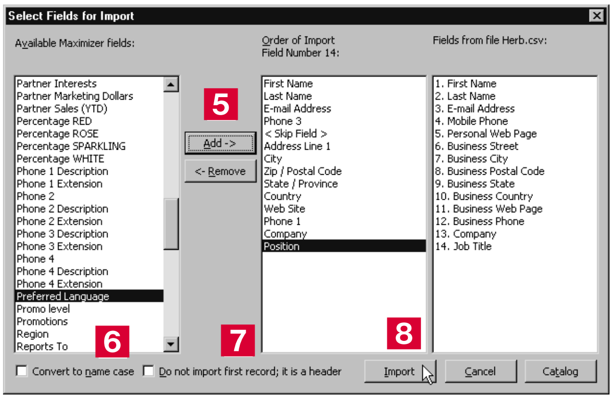
The fields listed in the Available Maximizer Fields column is slightly different, depending on whether you selected Companies / Individuals or Contacts as the Type of Import in step 3.

**6** To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** option.

**7** Many comma-delimited data files use the first line as a column header. To exclude the first line from being imported, select the **Do not import first record; it is a header** option.

You can save the field mapping for reuse by clicking the Catalog button.

**8** Click **Import**.




The data from the source file now imports into Maximizer.

**9** Repeat this procedure a second time to import the second tier, except select **Contacts** instead of **Companies / Individuals** as the Type of Import in step 3.

# Importing from Other Contact Managers

The instructions below describe importing data from a contact manager other than ACT! or GoldMine. For information about importing from ACT! or GoldMine, refer to page 229.

### ➤ To Import Contacts from another type of contact management database

Always back up the Address Book before importing.

1. From the File menu, select **Import** > **Other Contact Manager Database**.

   The Import Databases dialog box opens.

2. From the **List files of type** drop-down list, select the file format of the database you are importing.

3. Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** drop-down list to access the network drive.

4. In the **Import Options** group box, select the options you want to include. Depending on the type of database you are importing, some of these options may not be available.

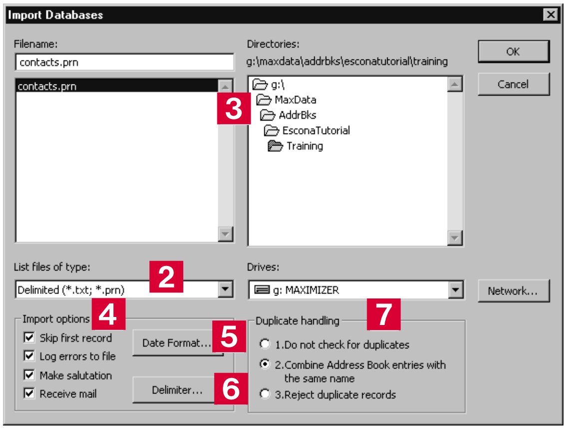
5. If you are importing a character delimited text file, you must specify a **Date Format**.

   To do so, click the **Date Format** button, select the date format used in the source file, and click **OK**.

6. If you are importing a .txt or .prn file, you must also specify the character used as the field **Delimiter** in the import file.

   Click the **Delimiter** button, select the delimiter type, and click **OK**.

**7** In the **Duplicate handling** group box, select one of the options to specify what Maximizer should do when it encounters duplicate Address Book entries, and click **OK**.




The Select Fields for Import dialog box opens.

**8** In the **Contact fields** or **Address Book entries fields** lists, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**. Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

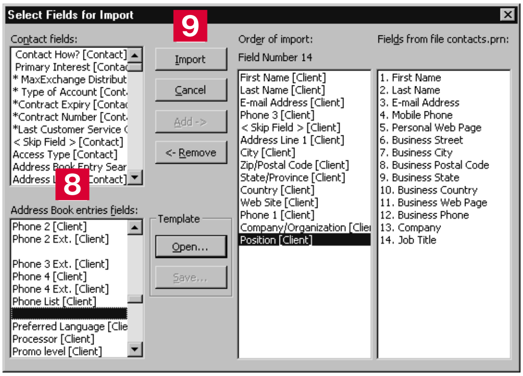
To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Contact fields or Address Book entries fields list.

Use **Contact fields** to create Contacts for Companies or Individuals.

Use **Address Book entries fields** to create Company or Individual Address Book entries.

9 Click **Import** to begin the import process.




Once Maximizer imports the data from the import file, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings.

The Error Log appears next displaying the location of the import error message file. If you want to view this file, make a note of where it is located. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

# Importing Data from ACT! and GoldMine

Duplicate Contacts are created on the second Import of the same ACT! or GoldMine database.

This section describes the procedure for importing data from ACT! or GoldMine, as well as the field mapping for data imported into Maximizer.

## Importing Contacts from ACT! 6.0, 2004, or Earlier, or from GoldMine 6.5 or Earlier

Always back up your Maximizer Address Book before importing data.

When importing GoldMine Contacts, GoldMine must be installed on the same machine as Maximizer; the Borland database engine is required during the import.

➤ **To import contacts from ACT! 6.0, 2004, or earlier, or from GoldMine 6.5 or earlier**

1. From the **File** menu, select **Import** > **ACT! 6.0 or 2004 or earlier**.

   – or –

   Select **Import** > **GoldMine 6.5 or earlier**.

   The Import Databases dialog box opens. The file type is selected for you automatically.

2. Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** field drop-down list to access the folder.

3. In the Import Options group box, select the **Log Errors to File** option if you want to log any errors that occur during the import process to a text file.

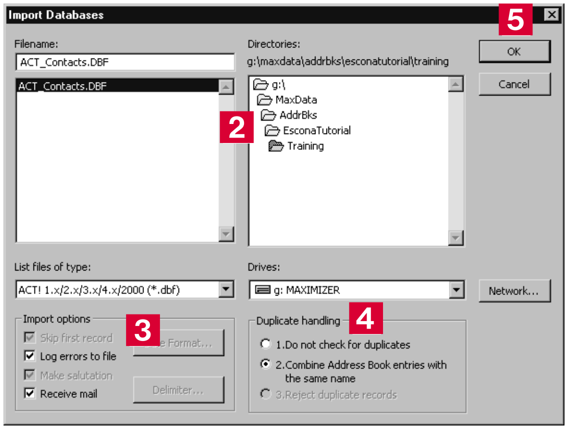
   All other options in the Import Options group box are handled automatically by Maximizer.

4. Specify how you want duplicate records handled, and click **OK**.

   If duplicate records are found in the data, the option you select here determines whether or not duplicate records are combined. They will be added to the Address Book.

   Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book entry ID that is the same as an existing Maximizer Address Book entry or Contact, the Address Book entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

5 Click **OK** to begin the Import process.




During the import process, a status indicator appears on the screen. Click **Cancel** if you want to halt the import process.

The Errorlog.txt file appears in the same folder as the import file. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

6 Once the data is imported, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, or merged, and the number of records with associated import warnings. Click **OK** to close the message box.

## Importing from ACT! 2005/2006 or ACT! Premium for Workgroups 2005/2006

Because ACT! 2005/2006 and ACT! 2005/2006 Premium run on their own SQL instance, the following steps must be performed to import data from them.

### ➤ To import from ACT! 2005/2006 or ACT! Premium for Workgroups 2005/2006

Always back up your Maximizer Address Book before importing data.

1 Back up your ACT! database in ACT!.

The Backup is typically saved to C:\Documents and Settings\<User Name>\My Documents\ACT\ACT for Win 7\Databases\

2 In the Backup folder, there should be a zip file. Open this zip file and extract the .BAK file that contains the name of your ACT! database in the filename.

3 The extracted file is a SQL backup. Restore this backup to a normal SQL 2000 (or greater) server.

See your SQL Server documentation for details on how to restore backups.

4 Once the backup is restored, create a DSN to point to the database on the SQL Server. For instructions on creating a DSN, refer to the procedure below.

5 Start Administrator.

6 Open the Address Book to import the data into.

7 Select **File** > **Import** > **ACT! 2005/2006 and ACT! Premium for Workgroups 2005/2006**.

8 Click **OK** on the message box.

9 Click the **Machine Data Source** tab, select the DSN you created in step 4, and click **OK**.

You will be prompted for your sa password.

10 Enter the sa password, and click **OK**.

Maximizer begins importing the data.

### ➤ To create a DSN to point to the database on the SQL Server

1 Open **Control Panel** > **Administrative Tools** > **Data Sources (ODBC)**.

2 Click the **System DSN** tab, and click the **Add** button.

3 Select **SQL Server**, and click **Finish**.

4 Give a meaningful name and description, select the SQL server where you placed the restored backup, and click **Next**.

5 Select the **With SQL Server authentication** option, fill in the Login ID as **sa**, enter the sa password, and click **Next**.

6 Select **Change the default database to**, select the restored ACT! database from the drop-down list, and click **Next**.

7 Click **Finish**.

8 Click the **Test Data Source** button to make sure the DSN was configured correctly.

9 Click **OK** and then **OK** again to save the DSN.

## Importing from GoldMine 6.7 Corporate Edition (or Earlier) SQL Databases

Always back up your Maximizer Address Book before importing data.

### ➤ To import from a GoldMine 6.7 Corporate Edition (or earlier) SQL database

1. Start Administrator.
2. Select **File** > **Import** > **GoldMine 6.7 Corporate Edition or earlier**.
3. Click **OK** on the message box.
4. Click the **Machine Data Source** tab, select the GoldMine DSN, and click **OK**.

   You will be prompted for your sa password.
5. Enter the sa password, and click **OK**.

   Maximizer begins importing the data.

## Setting User Passwords and Properties After Import

Note that if a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary. After importing data, set each user's password manually.

### ➤ To set user passwords, preferences, and properties after import

1. In Administrator, select **File** > **Users**.
2. Select the user's User ID, and click the **Password**, **Preferences**, or **Properties** button.

## ACT! Data Conversion

The following table describes field mapping between ACT! and Maximizer. Before importing data into Maximizer, export the data from ACT! to a DBF file and use the DBF file for the import.

| **ACT! 2000 (5.0), 6.0, 2004, 2005, or 2006** | **Maximizer** | **Imported?** | **Comments** |
|---|---|---|---|
| Company | Company | Yes | |
| Contact | First Name & Last Name | Yes | ACT! Contacts are imported as Contacts in Maximizer and the basic information about each Contact such as email address are imported into the Basic Info tab in the Address Book entry dialog box. If any of the information associated with the Contact cannot be mapped to a Maximizer field in this tab, the information is imported as user-defined fields. In ACT!, First and Last Name belong to the same single field. The correct names may not be properly imported into Maximizer. For example, a Contact 'Toni Spooner (female)' in ACT! is imported into Maximizer as "Toni Spooner" in the First name field and "(female)" in the Last name field. |
| Title | Position | Yes | |
| Department | Department, Position | Yes | In Maximizer, Department is populated with the Department information of the first Contact and the rest in the Position field separated by comma. |
| Phone | Phone 1 | Yes | |
| Fax | Phone 2 | Yes | Adds FAX to Extension field in Maximizer. |
| Mobile | Phone 4 | Yes | Adds CELL to Extension field in Maximizer. |
| Alt Phone | | No | |
| Ticker | UDF Ticker Symbol | Yes | Adds UDF to Company. |
| ID/Status | UDF ID/Status | Yes | Adds UDF to Company. |

| ACT! 2000 (5.0), 6.0, 2004, 2005, or 2006 | Maximizer | Imported? | Comments |
|---|---|---|---|
| Address | Address | Yes | First address line in ACT! is imported as Address 1 in Maximizer. Second line goes to Address 2. Address comes from one of the Contacts for this Company and if there is no address, it may end up empty. Alternate addresses are added to Maximizer from different Contacts of the Company and alternate addresses are named by that Contact. The same address is not added but renamed by the other Contact. For some Contacts, the appropriate alternate address may not be selected. |
| Address | Division | | Division in Maximizer may be populated by the address line in ACT!. |
| City | City/Town | Yes | Imported correctly to main and alternate addresses. |
| State | St/Co/Prov | Yes | Imported correctly to main and alternate addresses. |
| Zip | Zip/Postcode | Yes | Imported correctly to main and alternate addresses. |
| Country | Country | Yes | Imported correctly to main and alternate addresses. |
| Referred By | UDF Referred By | Yes | Adds UDF to Company. |
| Web Site | Website | Yes | Imported into the Company's website field. |
| E-mail Address | Email | Yes | Imported into the Contact's email field. |
| Last Result | Creates Table UDF named "Result" | Yes | Adds Company Table UDF with corresponding items selected for each Contact. |
| Assistant | | No | |
| Asst. Title | | No | |
| Asst. Phone | | No | |
| User fields for Contacts and Companies (ACT! 2005/2006 & ACT! 2005/2006 Premium only) | Creates UDFs for Contacts and Companies with the same name as in the source database | Yes | These fields can be renamed and can be changed to different field types. Any fields that are of MEMO type or are more than 120 Characters are converted to Notes in Maximizer. |
| User 1...User 15 (ACT! 2000 (5.0), 6.0, or 2004 only) | Creates UDFs named "Details Field 1"… "Details Field 15" | Yes | Adds UDFs to Company. Some UDFs that belong to some different Contacts in ACT! may be lost. |

| ACT! 2000 (5.0), 6.0, 2004, 2005, or 2006 | Maximizer | Imported? | Comments |
|---|---|---|---|
| Users | Users | Yes | ACT! users are imported into Maximizer as users. Passwords are set to “maximizer” if the import was done using a DBF file. Users are displayed in the Administrator’s Users dialog box which may be accessed by selecting File > Users.<br>If a user name contains spaces, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary.<br>Passwords must be set manually for each imported user. |
| Notes | Notes | Yes | |
| Schedule Call<br>Schedule To-do | Hotlist Task | Yes | The Duration information of a task in ACT! is imported as “Prior to task” in Maximizer.<br>The Company name of some conflicting tasks may not be preserved. |
| Schedule Meeting | Appointments | Yes | Recurring appointments are not imported. |
| Notes Attachments | Notes Attachments | No | |
| Document | Document | No | |
| Groups | Groups | No | |
| Sales/ Opportunities | Opportunities | No | |
| History (ACT! 2005/2006 & ACT! 2005/2006 Premium only) | Notes | Yes | Each entry from the History tab in ACT! becomes a Note in Maximizer. |

## GoldMine Data Conversion

The following table describes field mapping between GoldMine and Maximizer.

Note that Action, Call, and Appointment notes in GoldMine 6.0 may be in HTML format. When you import these notes into Maximizer, they contain HTML tags.

| **GoldMine 5.x, 6.0, & 6.5, & 6.7** | **Maximizer** | **Imported?** | **Comments** |
|---|---|---|---|
| Company | Company | Yes | |
| Contact<br>First Name Initial<br>Last Name | First Name Initial<br>Last Name | Yes | GoldMine's Contact field contains (First Name) (Initial) (Last Name) separated by spaces. In Maximizer, appropriate fields are populated accordingly. |
| Title | Position | Yes | |
| Dept | Dept. | Yes | In Maximizer, Dept. is populated with the department of the main Company's Contact. |
| Asst | Assistant (UDF) | Yes | Adds UDF to Contact record. |
| Source | Contact type (UDF) | Yes | Adds UDF to Contact record. |
| Address | Address1 & Address2 | Yes | Address from the main Contact becomes the main Company address. The first line in the Address field from GoldMine goes to Address1 in Maximizer. The second line goes to Address2. The third line from GoldMine is NOT imported.<br>Alternate Addresses in Maximizer are created from the addresses of the Contact from the Contacts tab in GoldMine. Appropriate Alternate Addresses are selected for imported Contacts. |
| City | City/ Town | Yes | Imported correctly to main and alternate addresses. |
| State | St/Co/Prov | Yes | Imported correctly to main and alternate addresses. |
| Zip | Zip | Yes | Imported correctly to main and alternate addresses. |
| Country | Country | Yes | Imported correctly to main and alternate addresses. |
| Phone 1-3 | Phone 1-3 | Yes | Appropriate extensions are imported. |
| Fax | Phone 4 | Yes | Adds FAX to Extension field in Maximizer. |

| GoldMine 5.x, 6.0, & 6.5, & 6.7 | Maximizer | Imported? | Comments |
|---|---|---|---|
| E-mail | Email | Yes | Email address of the main Contact is imported.<br>Email addresses of Contacts from the Contacts tab in GoldMine are also imported. |
| Web Site | Website | Yes | Imported to main Contact record. |
| Contact Type | Contact Type | Yes | Adds UDF to Contact record. |
| Business | Business | Yes | Adds UDF to Contact record. |
| Interest | Interest | Yes | Adds UDF to Contact record. |
| Accnt Mngr | Accnt Mngr | Yes | Adds UDF to Contact record. |
| Open | Open | Yes | Adds UDF to Contact record. |
| Summary | Note | Yes | A note containing details from the Summary tab is created for the Company. |
| Role<br>Status<br>Account Type<br>Account Size<br>No. of Users<br>Key Interest<br>Competitor<br>Platform | User role<br>Purchase Status<br>Account Type<br>Account Size<br>Users<br>Key Interest<br>Competitor<br>Platform | Yes | Appropriate UDFs are created in Maximizer and populated with proper values. |
| Notes | Note | Yes | A note is created for the Contact in Maximizer and contains all the notes from the Notes tab in GoldMine. |
| Users | Users | Yes | GoldMine's users are imported into Maximizer as users. Users are displayed in the Administrator's Users dialog box, which is accessible through the File > Users menu.<br>If spaces are included in a user name, the spaces are replaced with underscores, and the user names are shortened to 9 characters if necessary.<br>Passwords must be set manually for each imported user. |
| Details | Notes | Yes | For every detail, a note is created. Details are referred to as Profiles in the notes. |
| Pending | Hotlist Task | Yes | Each entry from the Pending tab in GoldMine is imported as Hotlist task in Maximizer. |

| GoldMine 5.x, 6.0, & 6.5, & 6.7 | Maximizer | Imported? | Comments |
|---|---|---|---|
| Calendar | Hotlist Tasks | Yes | Calls and Activities from GoldMine's Calendar are imported as Hotlist tasks in Maximizer. |
| Referrals | Notes | Yes | A note is created for every Referral. Referrals are called References. |
| History | Notes | Yes | Each entry from the History tab in GoldMine becomes a Note in Maximizer. |
| Members | | No | |
| Tracks | | No | |
| Links | | No | |
| Opptys | | No | |
| Projects | | No | |
| Partner | Notes | Yes | Limited information is imported. |

# Importing Mailing Lists from ListsNOW.com

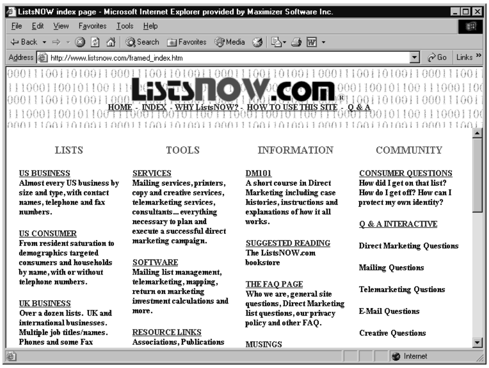
ListsNOW.com is an Internet list-brokering service that provides you with access to over 200 million households in the US and UK. ListsNOW.com allows you to search and download targeted and qualified marketing lists based on criteria you select. The lists can be downloaded to your computer and then imported directly into Maximizer as Address Book entries. You can then use the data for your marketing campaigns or sales prospecting activities.

By personally selecting the criteria for your target markets, ListsNOW.com allows you to cost-effectively narrow your list of targeted consumers to those most likely to be interested in your product or service. The listings are comprehensive, up-to-date, and versatile.

### ➤ To access mailing lists from ListsNOW.com

1. In Maximizer, select **Web** > **Mailing Lists** from the menu.

   The ListsNOW.com page opens in your web browser.




2. From the ListsNOW.com home page, click **Enter** to see the main menu page.

3. Peruse the information under the **Tools**, **Information**, and **Community** headings.

ⓘ Click the "How to Use This Site" link for assistance with using ListsNOW.com.

Under the Lists heading, available lists are broken down into the following categories:

- US Business — almost every US business by size and type, with contact names, telephone and fax numbers. Links to Centrus Online, AccuLeads, and Experian List Online.
- US Consumer — from resident saturation to targeted consumers and households by name, with or without telephone numbers. Links to Centrus Online, zapdata.com, AccuLeads, and Experian List Online.
- UK Business — over a dozen lists of UK and international businesses. Multiple job titles/names. Phone and some fax numbers available.
- UK Consumer — almost every household in the UK. Select by wealth and by lifestyle demographics.
- Opt-in Email — select by list source and opt-in interest plus other consumer and business demographics. Link to Postmaster Direct Response.

4. After selecting a category, follow the ListsNOW.com or vendor instructions to narrow down your list to a business profile—sales volume, number of employees, office type, and other criteria.
5. Once you have specified the criteria for the list, choose how many records to purchase and in what format to receive them.
6. Import the list into Maximizer, as described below.

## Importing a List into Maximizer

After downloading the data file, Maximizer's Administrator module allows you to import lists you acquire from ListsNOW.com and other sources, including Acxiom ListConnect, MyProspects, and ThinkDirectMail.

With the list database file on your computer or diskette, import the data file using File > Import Other Contact Manager Database. For more information, see "Importing Data from Other File Formats" on page 221.

# Transferring Entries between Address Books

Encrypted user-defined fields cannot be transferred or exported to another Address Book.

Importing refers to copying data from an external database into a Maximizer Address Book. However, transferring refers to copying data between Maximizer Address Books. Transferring data is ideal for merging Address Books together and sharing entries and setups.

Entries cannot be transferred using Administrator. You must use Maximizer.

Transfer rights can be set on a per-user basis, although some field transfer options apply to all users.

## What Happens During a Transfer?

Once you start a transfer, Maximizer uses the following rules to determine which records to copy from the source Address Book into the target Address Book:

- **Address Book entry IDs**: If an Address Book entry ID number from the source Address Book does not exist in the target Address Book, the Address Book entry is inserted into the target Address Book.

Note that each Address Book entry has a unique ID.

- **Address Book entry names**: If the Address Book entry ID number from the source exists in the target Address Book, Maximizer compares the source and target Address Book entry names.

  If the names are different, Maximizer changes the ID number in the target Address Book and inserts the entry as a new Address Book entry.

  If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.
- **Date and Time**: Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book that has been modified more recently than the data in the source Address Book.

# Transfer Address Book Entries

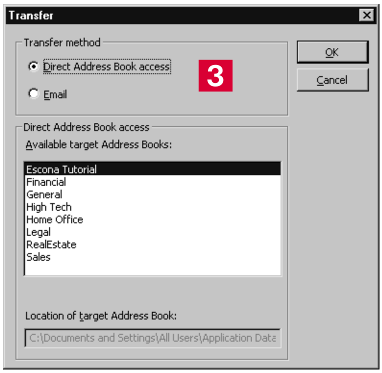
For more information about transferring other information such as column setups, see the online help.

By default, when you transfer Companies or Individuals, the following are included: all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, orders, and opportunities. Encrypted user-defined fields cannot be transferred.

### ➤ To transfer Address Book entries

To see if you have transfer and export rights, go to File > Users (select your user ID) > Properties > Access Rights.

1. In the Address Book window in Maximizer, select the entries to transfer.
2. Select **File** > **Transfer** > **Address Book Entries**.
3. Select **Direct Address Book Access** or **Email** as the transfer method.
4. If you have chosen to transfer your Address Book entries using **Direct Address Book access**, select the **target Address Book** before clicking **OK**.




A login dialog box appears.

5. Type your **User ID** and **Password** to log into the target Address Book, and click **OK**.

The Transfer Address Book Entries dialog box appears.

6. Select the **Transfer options**.

For example, you can choose whether to include user-defined fields, documents, notes, appointments, Hotlist tasks, orders, and opportunities.

7. Enter a **Message to log to notes** to be logged for each Address Book entry affected by the transfer in the source Address Book, if necessary.

8 To set the advanced options, click the **Advanced** button.

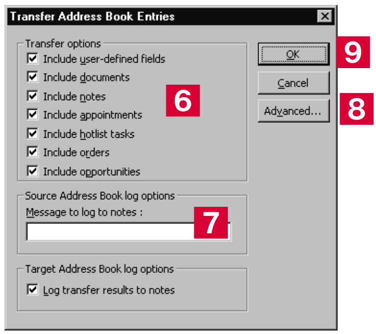
See the **F1** help for more information on each available option.

9 Click **OK** to begin the transfer.

When the transfer is complete, the Transfer Summary displays the results of the transfer.

If you chose to email the data, Maximizer prepares the transfer file (with an .MET extension) as an email file attachment and displays the Compose Mail Message dialog box.

10 **(Applies to Email transfer only.)** Enter the email address where you would like the transfer sent. See the Maximizer online help topic, Receiving Maximizer Data by Email, for detailed instructions on receiving a transfer by email.




## Transfer Summary Reports and Logging

Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book, Maximizer can optionally add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

# Adjusting Address Book Transfer Settings

Only the MASTER user can modify protection on fields.

You can set the options for transferring information between the open Address Book and other Address Books. Some of these are system options, which apply to all users; others are user-specific options, which apply to the selected user only.

Regardless of a user's transfer settings, encrypted user-defined fields cannot be transferred or exported to another Address Book.

### ➤ To adjust transfer settings for one user or all users

1. Select **File** > **Users**.
2. Select a user, and click **Preferences**.
3. Click the **Transfer** tab.
4. In the **Protect fields from update** list, double-click any fields you don't want included in the transfer.
   - **System** field transfer options apply to all users.
   - **User specific** field options apply to the selected user only.
5. In the **Transfer options** group box, set your transfer preferences.
6. In the **Advanced options** group box, set your advanced transfer preferences, which are described below:
   - The **Overwrite duplicates** option overwrites the target Address Book entry with source Address Book entry information when duplicate records are found.
   - The **Use record modify flag** option sets a flag to "on" when an Address Book entry is added or modified. Maximizer uses it as an internal check to determine if the Address Book entry has been modified since the last transfer.
   - The **Reset record modify flag** option resets the record modify flag back to null (not modified) for each transferred record.
7. If you don't want Maximizer to add a note for every Address Book entry that is added or updated in the target Address Book, clear the **Log transfer results to notes** checkbox.
8. Click **OK** to finish.

# Purging Outdated Notes and Documents

After a long period of activity, you may want to delete outdated notes and documents using Administrator’s purge feature.

When you purge notes, you must specify the note types to delete.

| Note Type | Creation Method |
|---|---|
| Email | Notes created in the Address Book window when you send an email to one or more Address Book entries. |
| History | Created when opportunities are added or changed. History notes can be printed or searched only from these windows. |
| Mail-out | Created when users print labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Mail-out notes are also created when users send an email to more than one Address Book entry. |
| Manual | Added manually to the Notes window. |
| Opportunity | Created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window. |
| Other | Third-party or custom notes created by the administrator. |
| Phone calls | Created when you dial a phone number, or log a received call. |
| Tasks | Created when appointments or Hotlist tasks are scheduled or completed. |
| Timed notes | Created when the Timer is used while writing a note. |
| Transfer log | Notes logged when Address Book entries are transferred between Address Books. |

The purge command deletes all notes, with the exception of other user’s private notes (unless the user purging the notes has rights to delete other users’ notes), in the specified date range for all Address Book entries in the open Address Book. You should back up the Address Book before purging notes.

### ➤ To purge notes

1. In Administrator, open the Address Book you want to clean up.
2. Select **File** > **Purge** > **Notes**.
3. Specify a date range.

   Maximizer deletes notes dated between the specified dates.
4. Select the type(s) of notes to delete, and click **OK**.

### ➤ To purge documents

1. In Administrator, open the Address Book you want to clean up.
2. Select **File** > **Purge** > **Documents**.
3. Specify a date range.

   Maximizer deletes documents dated between the specified dates.
4. If you want to purge private documents belonging to other users, select the **Delete other users' private documents** option.
5. Click **OK**.

# System Reports

HTML reports can be opened easily in Microsoft Excel, where you can edit the data as required.

The Reports menu in Administrator enables you to quickly create a number of reports about the open Address Book, as described below.

| Report | Information Reported |
|---|---|
| User ID List | • Total number of users in the Address Book<br>• Total number of security groups in the Address Book<br>For each user in the Address Book:<br>• User ID<br>• Display Name<br>• First and Last Name<br>• Phone number<br>• Email Address<br>• Maximizer Login Enabled/Disabled status<br>• User's Roles (Access Rights)<br>For each security group in the Address Book:<br>• Group Name<br>• Group ID<br>• Group members |
| User-Defined Fields | • Folder (if applicable) and field name<br>• Type of entry the field is applicable to (Company, Individual, Contact, Opportunity, or User)<br>• Full Access and Read Access<br>• Type (Table, Date, Alphanumeric, Numeric)<br>• Creator<br>• Requested by<br>• Description<br>• Attributes<br>• Items in Table user-defined fields<br>• Usage count (only if Show Usage Count checkbox selected in Print Report dialog box) |

| Report | Information Reported |
|---|---|
| Address Book Summary | Total number of each of the following types of entries in the current Address Book:<br>• Users<br>• Security groups<br>• Companies and Individuals<br>• Lowest, highest, average, and total number of contacts per Company and Individual<br>• Opportunities (total and per status)<br>• User-defined fields (total and per type)<br>• User-defined field entries (total and per type)<br>• Notes<br>• Documents<br>• |
| Current Users | • Number of licenses in use<br>For each user currently logged into the Address Book:<br>• User name<br>• Computer name<br>• Date and time logged in<br>• Maximizer module connected<br>Licenses installed:<br>• Product license number (PLN)<br>• Computer name<br>• Product<br>• User count<br>• Description<br>• Total number of applied licenses |

This report displays on-screen rather than printing. To print the report, press Alt and Print Screen to capture the report window to the Windows clipboard, and then paste it into a word processor or graphics program .

APPENDIX

# Administrator's Reference A

## In this chapter...

# Maximizer File Types

The following table lists the extensions of file types created in the registry during the Maximizer installation.

| Extension | Application | Comment |
|---|---|---|
| .MDE | MaxWin.exe | Maximizer Data Exchange file used by email transfer (prior to version 7 – now .MET) |
| .MEC | ecMecIm.exe | OrderDesk's order data file |
| .MET | MaxWin.exe | Maximizer Email Transfer files (version 7 and higher) |
| .MXD | MaxWord.ter | Maximizer Document extension |
| .MXI | MaxWin.exe | Maximizer XML format data file |
| .MTI | MaxWin.exe | Maximizer Transfer Interface (CSV format data file – elaborate or skip CSV altogether; manual says EDI, flags, etc.) |
| .MAX | MaxWin.exe | Maximizer Pervasive format data file |

The following table lists the extensions of file types used by Maximizer. These file types have no association in the registry.

| Extension | Application | Comment |
|---|---|---|
| .ETF | MaxWord.ter | Template files used by MaxWord |

The following table lists the extensions of file types created in the registry during the ecBuilder installation.

| Extension | Application | Comment |
|---|---|---|
| .MBD | ecBuild.exe | ecBuilder project data file |

# Maximizer Address Book Files

When an Address Book is open, never move, rename, or delete any of the data files using Windows Explorer. Doing so could damage the Address Book file(s) and cause serious errors. If you need to manipulate the data files, back up the Address Book(s), exit from Maximizer, and then proceed with the file procedures.

The following is a list of Maximizer Address Book files and short descriptions of their contents or purpose. Maximizer provides several data files, which you can copy, move, back up, and delete.

The data for each Address Book should be kept together in the same folder. If you move or delete a file, Maximizer automatically creates a new empty data file in its place.

| Address Book File | Contents or Purpose |
|---|---|
| Attrib.ddf | database structure files |
| Company.mkd | OrderDesk report headings |
| Field.ddf | database structure files |
| File.ddf | database structure files |
| Index.ddf | database structure files |
| Item.mkd | OrderDesk item options |
| Itemopt.mkd | OrderDesk item options |
| Mxza.max | set of accounts for income and expenses |
| Mxzap.max | Action Planner |
| Mxzapt.max | Action Planner template |
| Mxzat.max | Action template |
| Mxzc.max | basic Address Book entry information |
| Mxzcat.max | search catalog |
| Mxzcati.max | search catalog item |
| Mxzcd.max | helper file for Crystal Reports used as a temporary file for some report data |
| Mxzcfg.max | configuration information |
| Mxzcol.max | column setups |
| Mxzcold.max | column setup data |
| Mxzd.max | user-defined field information |
| Mxzdesc.max | descriptions of entries stored in other tables, such as descriptions of favorite lists, user-defined fields, column setups, etc. |
| Mxzdvn.max | system file used for user-defined views |
| Mxze.max | income and expense entries |
| Mxzf.max | database control file |

| Address Book File | Contents or Purpose |
|---|---|
| Mxzfav.max | favorites |
| Mxzfavd.max | favorites data |
| Mxzfldr.max | reserved for future use |
| Mxzh.max | Hotlist entries |
| Mxzl.max | documents, templates, and Company Library notes and documents |
| Mxzlock.max | used for locking user information |
| Mxzm.max | column setups, macros, and graph catalog |
| Mxzmsf.max | fields for Outlook Synchronization |
| Mxzmsr.max | records for Outlook Synchronization |
| Mxzmss.max | schedules for Outlook Synchronization |
| Mxzn.max | notes and Journal entries |
| Mxzo.max | opportunities |
| Mxzp.max | calendar appointments |
| Mxzq.max | related entries, Company Library tree, opportunities |
| Mxzres.max | appointment resources and locations, and user display names |
| Mxzright.max | system file used for user/groups individual rights |
| Mxzru.max | remote users table used to determine if column setups, Favorite Lists, Company Library documents/notes, and document templates are distributed |
| Mxzs.max | catalog of your favorite Address Book lists |
| Mxztran.max | Maximizer transaction control |
| Mxztran5.max | OrderDesk transaction control |
| Mxzu.max | user preferences |
| Mxzx.max | user-defined field and lookup tables |
| Ordcmnt.mkd | order comments |
| Orderinf.mkd | order information |
| Ordmsg.mkd | order messages |

## Backup Files

Backup file names correspond directly to the Maximizer data files except they use the filename extension "**.SAV**".

Maximizer sets each .SAV backup file to read-only so you don't accidentally delete it. The program also places a small control file called MXZ.SAV in each backup. This file contains the folder name and path of each file as well as the number of the backup. During a backup, Maximizer overwrites any previous .SAV files.

APPENDIX B

# Crystal Reports Database Tables Reference

*Maximizer Database Tables Reference*

## In this chapter...

# Overview

This chapter is a technical reference for using Crystal Reports with Maximizer data. Crystal Reports uses the Maximizer ODBC driver.

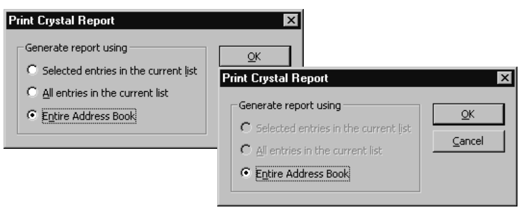
For more how-to information about generating and storing Crystal Reports for Maximizer, refer to "Crystal Reports" on page 190.

# Data Population for the Current Window

When you create a new report template or edit an existing report template, the default table/view for the report is based on the current Maximizer window. You are connected to the **MAM_[Address Book name]** data source by default. If you want to link to additional tables, you must do so in the **Database Expert** dialog box in Crystal Reports. See "Linking" on page 259 for more information.

| Controlling Window | Tables for Maximizer ODBC |
|---|---|
| Address Book | CLIENT |
| Opportunity | OPPORTUNITY |
| Hotlist | HOTLIST |

If you are not in the controlling window that corresponds with the type of report you choose, you are limited to running the report on all entries in the Address Book rather than a selected or current entry list.



# Database Tables and Views for User-Defined Fields

When you create a user-defined field, a database view for that user-defined field is also created. Views are created if you are using the Pervasive.SQL driver, and tables are created if you are using the Maximizer ODBC driver. You can use these tables or views to report on user-defined fields in Crystal Reports. For example, when a new Address Book user-defined field called “Salary” is created, a new table or view named “A_Salary” is dynamically created. Based on the type of user-defined field, the table or view name is prefixed by a designated letter. The following tables identify the table or view name prefixes for each type of user-defined field.

## Pervasive.SQL View Prefixes

The Pervasive.SQL driver creates database views for user-defined fields, using the following prefixes.

| Prefix | Type of user-defined field |
|---|---|
| A_ | Address Book |
| O_ | Opportunity |
| U_ | Users |
| S_ | System |

## Maximizer ODBC Table Prefixes

The Maximizer ODBC driver creates database tables for user-defined fields, using the following prefixes.

| Prefix | Type of user-defined field |
|---|---|
| U_ | Address Book |
| V_ | Opportunity |
| X_ | (X followed by a SINGLE underscore) Applies to special user-defined fields and System Fields, such as X_Category, etc. |
| Y_ | User |

Note that when a user-defined field begins with a special character, such as an asterisk, the special character is replaced by an underscore in the ODBC table name. For example, an opportunity user-defined field named “*Maintenance” would have a table name “V_ _Maintenance”.

# Database Driver Used to Create Crystal Reports

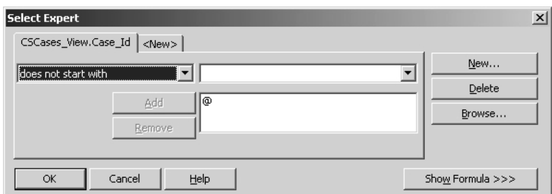
Maximizer uses the Maximizer ODBC driver (MAM_ DSN) to create Crystal Reports. However, Crystal Reports created in Maximizer 8 for Pervasive.SQL were created using the Pervasive.SQL driver, and will use that driver when they are opened in later versions of Maximizer.

# Filtering Data

In order to report on particular types of data, you need to use selections or filtering in Crystal Reports. Use the Select Expert (Report > Select Expert) to select or filter data for your report. In the case of the Address Book table/view, use the Record_Type field to select or filter Address Book entries. For example, to create a report that only shows Company records, use the Select Expert to return only those records where "Record_Type = 1". See the "Maximizer ODBC Data Tables" on page 263 section for more information on data types.

You can also filter or select the data for the report using Maximizer. Once a report has been saved, populate the appropriate Maximizer windows with the desired information then run the personal report and select the all entries in the current list option.

Maximizer contains default records in many of the common modules. These are denoted by an "@" sign and can be filtered using the Select Expert by using the "does not start with" criteria as illustrated in the following graphic.




| Address Book Entry Data Type | Record Type |
|---|---|
| Company | Record_Type = 1 |
| Individual | Record_Type = 2 |
| Contact | Record_Type = 31 |

| Address Book Entry Data Type | Record Type |
|---|---|
| Individual Contact | Record_Type = 32 |
| Default Entry | Record_Type = 5 |
| Alternate Address for Contact | Record_Type = 41 |
| Alternate Address for Individual | Record Type = 42 |

# Linking

Linking determines how the report data elements are related. For example, to report all notes related to an Address Book Entry you would link the Client_Id and Contact_Number fields of the CLIENT table to the fields of the same name in Notes.

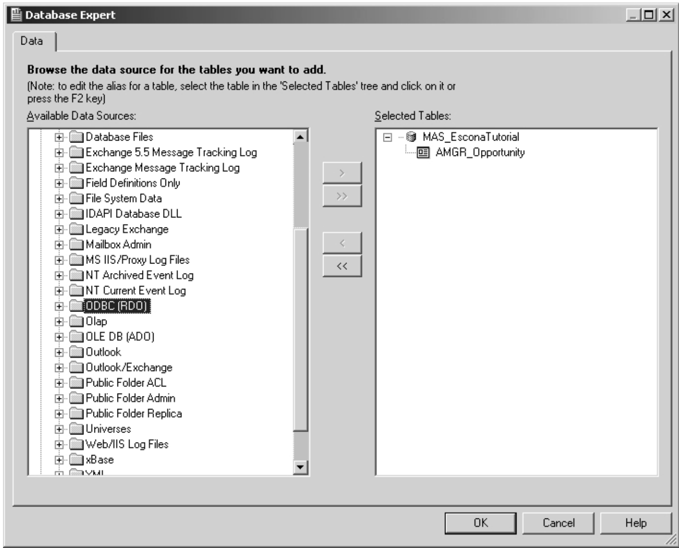
Crystal Reports enables you to specify the type of join and type of link you want to use when linking tables. Joins and links indicates how linked fields in two tables are compared when records are read. Join, enforce, and link options can be specified in the Link Options dialog box. Using the various join enforcement options can ensure that linked tables are included in the SQL query, even when none of the fields in the table are used in the report. The Crystal Reports online help files contain more information on Linking options.

# Controlling Windows

As mentioned previously, when you choose to create a new report template or edit an existing template, the default table for the report is based on the active controlling window. Following is an example of a controlling window in Maximizer outlining the associated table name, links, and common selections.

# Including Additional Tables in Your Reports

To include additional tables in your reports, you must link them to the parent table of the controlling window. You do so through the Database Expert (Database > Database Expert) by linking to the ODBC (RDO) data source.

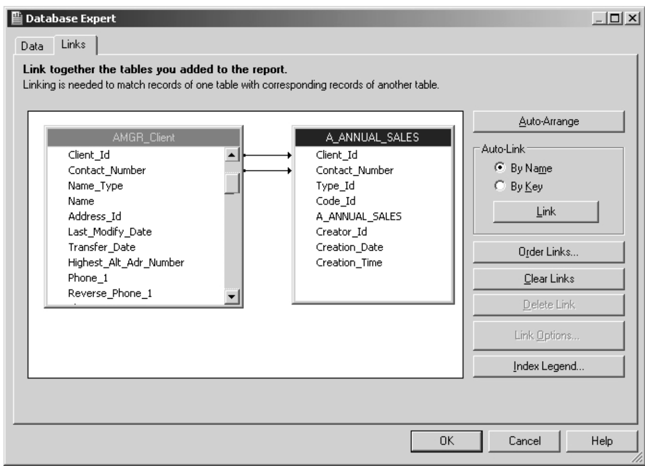


# User-Defined Fields Example

When a new User-Defined Field is created, a new database table or view for that User-Defined Field is also created. User-Defined Fields can be associated with Address Book, Opportunity, and Users. Use the Database Expert (Database > Database Expert) to include a user-defined field and link it to the desired parent view/table.

The following example is using a user-defined field named “Annual Sales”.

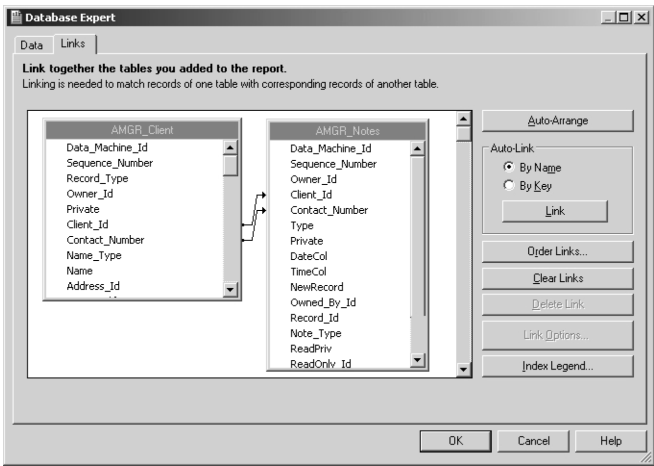
| User-Defined Field | Maximizer ODBC |
|---|---|
| User-defined field view name | U_<user-defined field name><br>example: U_ANNUAL_SALES |
| Links | Client_Id => Client_Id<br>Contact_Number => Contact_Number |



# Notes Example

Each note created for an Address Book entry is a record in the table called Notes. To report on notes associated with Address Book entries, you must add the view and link it to the Address Book entry table according to the following table.

| Note | Maximizer ODBC |
|---|---|
| Notes view name | Notes |
| Links | Client_Id => Client_Id<br>Contact_Number => Contact_Number |



# Maximizer ODBC Data Tables

The following is an appendix of the most common Maximizer ODBC tables.

## Client Table

The Client table is a read-only table that contains information about Company, Individual, and Contact Address Book entries and encompasses the Company, People, and Address tables. This table is useful for reporting purposes.

**Table 1 Client Table – Table Rules**

| | |
|---|---|
| **Read Rule** | Read-only |
| **Delete Rule** | Read-only |
| **Insert Rule** | Read-only |
| **Update Rule** | Read-only |

**Table 2 Client Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 |
|---|---|---|---|
| 1 | Unique | Data_Machine_Id | Sequence_Number |
| 2 | Non-Unique | Name_Type | Name |
| 3 | Non-Unique | City | |
| 4 | Non-Unique | State_Province | |
| 5 | Non-Unique | Zip_Code | |
| 6 | Non-Unique | Firm | |
| 7 | Non-Unique | Reverse_Phone_1 | |
| 8 | Unique | Client_Id | Contact_Number |

**Table 3 Client Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Data_Machine_Id | Long | 4 | | Yes | |
| Sequence_Number | Long | 4 | | Yes | |

**Table 3 Client Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Record_Type | String | 2 | Company.<br>Record_Type<br>OR<br>People.<br>Record_Type | Yes | Type of record:<br>1 = Company<br>2 = Individual<br>5 = Default Entries<br>31 = Company Contact<br>32 = Individual Contact<br>41 = Company or Company Contact Alternate Address<br>42 = Individual or Individual Contact Alternate Address |
| Owner_Id | String | 11 | | Yes | |
| Private | Integer | 2 | | Yes | |
| Client_Id | String | 23 | | Yes | Unique identification number of the Company, Individual, Contact, Alternate Address, or Default Entry. |
| Contact_Number | Integer | 2 | | Yes | 0 = Company or Individual<br><60,000 or <-5536[a] = Contact<br>≥60,000 or ≥-5536 = Alternate address |
| Name_Type | String | 1 | | Yes | C = Company<br>I = Individual or Contact |
| Name | String | 59 | | Yes | Name of Company, or<br>Last name of Individual or Contact. |
| Address_Id | Integer | 2 | Client.<br>(Client_Id,<br>Address_Id)<br>=<br>Address.<br>(Client_Id,<br>Address_Id) | Yes | System-generated unique address identification number. Points to the address to use for the Address Book entry.<br>0 = Main address<br>≥ 60,000 or ≥-5536a = alternate address<br>Non-modifiable. |
| Last_Modify_Date | DateString | 10 | | Yes | |
| Last_Modify_Time | TimeString | 11 | | Yes | |
| Transfer_Date | DateString | 10 | | Yes | Date and time when the last transfer occurred. |
| Transfer_Time | TimeString | 11 | | Yes | |

**Table 3 Client Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Highest_Alt_Add_Number | Integer | 2 | | Yes | Highest alternate address number in use. |
| Phone_1 | String | 21 | | Yes | |
| Reverse_Phone_1 | String | 21 | | Yes | |
| Phone_1_Extension | String | 21 | | Yes | |
| Phone_2 | String | 21 | | Yes | |
| Reverse_Phone_2 | String | 21 | | Yes | |
| Phone_2_Extension | String | 21 | | Yes | |
| Phone_3 | String | 21 | | Yes | |
| Reverse_Phone_3 | String | 21 | | Yes | |
| Phone_3_Extension | String | 21 | | Yes | |
| Phone_4 | String | 21 | | Yes | |
| Reverse_Phone_4 | String | 21 | | Yes | |
| Phone_4_Extension | String | 21 | | Yes | |
| Highest_Contact_No | Integer | 2 | | Yes | Highest Contact_Number in use. |
| Receives_Letters | Integer | 2 | People.Receives_Letters | Yes | Indicates whether contact (Record_Type = 31 or 32) receives mail sent to the Company/Individual:<br>0 = Contact doesn't receive mail sent to Company/Individual<br>1 = Contact receives mail sent to Company/Individual<br>**Note:**<br>• For Individual records (Record_Type = 2), this value is always 1.<br>• For Company records (Record_Type = 1) and Alternate Addresses (Record_Type = 41 or 42), this value is always 0. |

**Table 3 Client Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Use_Client_Name | Integer | 2 | Client. Use_Client_Name = People. Use_Client_Name | Yes | Applies to Contacts (Record_Type = 31 or 32) only. Indicates whether the Contact's Company/Individual name should be included in the address:<br>0 = Do not include Company/ Individual name in address<br>1 = Include Company/ Individual name in address |
| First_Name | String | 39 | | Yes | Applies to Individuals and Contacts only (Record_Type = 2, 31, or 32). |
| Initial | String | 39 | | Yes | |
| Mr/Ms | String | 39 | | Yes | |
| Title | String | 59 | | Yes | |
| Salutation | String | 39 | | Yes | |
| Department | String | 39 | | Yes | |
| Firm | String | 59 | | Yes | Applies to Individuals (Record_Type = 2) only. |
| Division | String | 39 | | Yes | |
| Address_Line_1 | String | 39 | | Yes | |
| Address_Line_2 | String | 39 | | Yes | |
| City | String | 39 | | Yes | |
| State_Province | String | 39 | | Yes | |
| Country | String | 39 | | Yes | |
| Zip_Code | String | 19 | | Yes | |
| Change_Bits_Low | Long | 4 | | Yes | MaxMerge change fields. Used by Maximizer. Do not use. |
| Change_Bits_High | Long | 4 | | Yes | |
| Last_Client_Id | String | 23 | | Yes | Last Client ID used for transfer. |
| Creator_Id | String | 11 | | Yes | |
| Creation_Date | DateString | 10 | | Yes | |
| Creation_Time | TimeString | 11 | | | |

**Table 3 Client Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Assigned_To | String | 11 | User_Details.User_Id | Yes | User_Id of user assigned to the Address Book entry as the Account Manager. Applies to Company (Record_Type = 1), Individual (Record_Type = 2), and Default Entry (Record_Type = 5) records only. |
| Phone_1_Desc | String | 21 | | Yes | |
| Phone_2_Desc | String | 21 | | Yes | |
| Phone_3_Desc | String | 21 | | Yes | |
| Phone_4_Desc | String | 21 | | Yes | |
| Email_1_Desc | String | 15 | | Yes | |
| Email_2_Desc | String | 15 | | Yes | |
| Email_3_Desc | String | 15 | | Yes | |
| Reports_To | Long | 4 | Client.Reports_To = People.Reports_To | Yes | Contact_Number of Contact (Record_Type = 31 or 32) to whom this contact reports (e.g., contact's supervisor or manager). Applies only to Contact records (Record_Type = 31 or 32). |
| Partner_Id | String | 23 | Client.(Partner_Id, Partner_Number) = ABPartners.(Partner_Id, Partner_Number) | Yes | Identifies the Address Book entry that is a partner to the company or individual. |
| Partner_Number | Integer | 2 | | Yes | |
| Lead_Status | Integer | 2 | | Yes | |
| ReadOnly_Id | String | 11 | | | |
| ReadPriv | Integer | 2 | | | |

a. The ODBC driver converts unsigned integers (e.g., 60,000) to signed integers (e.g., -5536). You can convert the signed integers to their unsigned equivalents using the constant 65536. For example, 65536 - 5536 = 60000.

# Company Table

The Company table includes fields for Company Address Book entries.

**Table 4 Company Table – Table Rules**

| | |
|---|---|
| **Read Rule** | |
| **Delete Rule** | Any records that use the same Client_Id will be deleted |
| **Insert Rule** | |
| **Update Rule** | |

**Table 5 Company Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 |
|---|---|---|---|
| 1 | Unique | Data_Machine_Id | Sequence_Number |
| 2 | Non-Unique | Name_Type | Company_Name |
| 3 | Non-Unique | Reverse_Phone_1 | |
| 4 | Unique | Client_Id | Contact_Number |

**Table 6 Company Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Data_Machine_Id | Long | 4 | | Yes | |
| Sequence_Number | Long | 4 | | Yes | |
| Record_Type | String | 2 | | Yes | Type of record:<br>1 = Company<br>Always 1 for records in Company table. |
| Owner_Id | String | 11 | | Yes | |
| Private | Integer | 2 | | | If modified will also modify all contacts and addresses with the same Client_Id. |
| Client_Id | String | 23 | Company.(Client_Id, Contact_Number) = Client.(Client_Id, Contact_Number) | | Unique identification number. System generated if Null and "System to assign ID numbers" is checked. Must be unique. Non-modifiable. |
| Contact_Number | Integer | 2 | | Yes | Always 0 for records in the Company table. |

**Table 6 Company Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Name_Type | String | 1 | | Yes | Always C (i.e., Company) for records in the Company table. |
| Company_Name | String | 59 | | | Mandatory field. |
| Address_Id | Integer | 2 | Company.(Client_Id, Address_Id) = Address.(Client_Id, Address_Id) | Yes | System-generated unique address identification number.<br>Points to the address to use for the Address Book entry.<br>0 = Main address<br>≥ 60,000 or ≥-5536[a] = alternate address<br>Non-modifiable. |
| Last_Modify_Date | DateString | 10 | | | |
| Last_Modify_Time | TimeString | 11 | | | |
| Transfer_Date | DateString | 10 | | | Date and time of transfer. If left empty, defaults to the system clock. |
| Transfer_Time | TimeString | 11 | | | |
| Phone_1 | String | 21 | | | |
| Reverse_Phone_1 | String | 21 | | Yes | |
| Phone_1_ Extension | String | 21 | | | |
| Phone_2 | String | 21 | | | |
| Reverse_Phone_2 | String | 21 | | Yes | |
| Phone_2_ Extension | String | 21 | | | |
| Phone_3 | String | 21 | | | |
| Reverse_Phone_3 | String | 21 | | Yes | |
| Phone_3_ Extension | String | 21 | | | |
| Phone_4 | String | 21 | | | |
| Reverse_Phone_4 | String | 21 | | Yes | |
| Phone_4_ Extension | String | 21 | | | |
| Change_Bits_Low | Long | 4 | | | MaxMerge change fields. Used by Maximizer. Do not use. |
| Change_Bits_High | Long | 4 | | | |

**Table 6 Company Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Creator_Id | String | 11 | | Yes | |
| Creation_Date | DateString | 10 | | Yes | |
| Creation_Time | TimeString | 11 | | | |
| Assigned_To | String | 11 | User_Details. User_Id | Yes | User_Id of user assigned to the Address Book entry as the Account Manager. |
| Phone_1_Desc | String | 21 | | | |
| Phone_2_Desc | String | 21 | | | |
| Phone_3_Desc | String | 21 | | | |
| Phone_4_Desc | String | 21 | | | |
| Email_1_Desc | String | 15 | | | |
| Email_2_Desc | String | 15 | | | |
| Email_3_Desc | String | 15 | | | |
| Partner_Id | String | 23 | Company. (Partner_Id, Partner_Number) = ABPartners. (Partner_Id, Partner_Number) | Yes | Identifies the Address Book entry that is a partner to the company or individual. |
| Partner_Number | Integer | 2 | | Yes | |
| Lead_Status | Integer | 2 | | Yes | |
| ReadOnly_Id | String | 11 | | | |
| ReadPriv | Integer | 2 | | | |

a. The ODBC driver converts unsigned integers (e.g., 60,000) to signed integers (e.g., -5536). You can convert the signed integers to their unsigned equivalents using the constant 65536. For example, 65536 - 5536 = 60000.

# People Table

The People table includes fields for Individual entries and Contacts.

**Table 7 People Table – Table Rules**

| | |
|---|---|
| **Read Rule** | |
| **Delete Rule** | Any records that use the same Client_Id and Contact_Number will be deleted |
| **Insert Rule** | |

**Table 7 People Table – Table Rules (Continued)**

| | |
|---|---|
| **Update Rule** | |

**Table 8 People Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 |
|---|---|---|---|
| 1 | Unique | Data_Machine_Id | Sequence_Number |
| 2 | Non-Unique | Name_Type | Last_Name |
| 3 | Non-Unique | Reverse_Phone_1 | |
| 4 | Unique | Client_Id | Contact_Number |

**Table 9 People Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Data_Machine_Id | Long | 4 | | Yes | |
| Sequence_Number | Long | 4 | | Yes | |
| Record_Type | String | 2 | Client. Record_Type | Yes | Type of record:<br>2 = Individual<br>31 = Company Contact<br>32 = Individual Contact |
| Owner_Id | String | 11 | | Yes | |
| Private | Integer | 2 | | | 0 = Public (any user may view the record)<br>1 = Private (only the user or group specified in the Owner_Id field may view or modify the record) |
| Client_Id | String | 23 | People. (Client_Id, Contact_Number) = Client. (Client_Id, Contact_Number) | | Unique identification number. System generated if Null and "System to assign ID numbers" is checked. If a contact, the Company/Individual must already exist. Non-modifiable. (Client_Id, Contact_Number) must be unique. |
| Contact_Number | Integer | 2 | | | Unique identification number. Non-modifiable. (Client_Id, Contact_Number) must be unique. Valid values: 0 - 59999.<br>0 = Individual<br>1 - 59999 = Contact. |

**Table 9 People Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Name_Type | String | 1 | | Yes | Always I (uppercase i). |
| Last_Name | String | 59 | | | Mandatory field. |
| Address_Id | Integer | 2 | People.(Client_Id, Address_Id) = Address.(Client_Id, Address_Id) | Yes | System-generated unique address identification number. Points to the address to use for the Address Book entry. Non-modifiable.<br>0 = Main address<br>≥ 60,000 or ≥-5536[a] = alternate address |
| Last_Modify_Date | DateString | 10 | | | |
| Last_Modify_Time | TimeString | 11 | | | |
| Transfer_Date | DateString | 10 | | | Date and time of transfer. If left empty defaults to the system clock. |
| Transfer_Time | TimeString | 11 | | | |
| Phone_1 | String | 21 | | | |
| Reverse_Phone_1 | String | 21 | | Yes | |
| Phone_1_ Extension | String | 21 | | | |
| Phone_2 | String | 21 | | | |
| Reverse_Phone_2 | String | 21 | | Yes | |
| Phone_2_ Extension | String | 21 | | | |
| Phone_3 | String | 21 | | | |
| Reverse_Phone_3 | String | 21 | | Yes | |
| Phone_3_ Extension | String | 21 | | | |
| Phone_4 | String | 21 | | | |
| Reverse_Phone_4 | String | 21 | | Yes | |
| Phone_4_ Extension | String | 21 | | | |

**Table 9 People Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Receives_Letters | Integer | 2 | People. Receives_Letters = Client. Receives_Letters | | Indicates whether contact or individual receives mail sent to the Company:<br>0 = Contact or Individual doesn't receive mail sent to Company<br>1 = Contact or Individual receives mail sent to Company<br>**Note:** For Individuals (Record_Type = 2), this value is always 1. |
| Use_Client_Name | Integer | 2 | People. Use_Client_Name = Client. Use_Client_Name | | Applies to Individuals (Record_Type = 2) and Contacts (Record_Type = 31 or 32) only. Indicates whether the individual or Contact's Company name should be included in the address:<br>0 = Do not include Company name in address<br>1 = Include Company name in address |
| First_Name | String | 39 | | | |
| Initial | String | 39 | | | |
| Mr/Ms | String | 39 | | | |
| Title | String | 59 | | | |
| Salutation | String | 39 | | | |
| Change_Bits_Low | Long | 4 | | | MaxMerge change fields. Used by Maximizer. Do not use. |
| Change_Bits_High | Long | 4 | | | |
| Creator_Id | String | 11 | | Yes | |
| Creation_Date | DateString | 10 | | Yes | |
| Creation_Time | TimeString | 11 | | | |
| Assigned_To | String | 11 | User_Details. User_Id | Yes | User_Id of user assigned to the Address Book entry as the Account Manager.<br>Applies to Individual (Record_Type = 2) records only. |

**Table 9 People Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Phone_1_Desc | String | 21 | | | |
| Phone_2_Desc | String | 21 | | | |
| Phone_3_Desc | String | 21 | | | |
| Phone_4_Desc | String | 21 | | | |
| Email_1_Desc | String | 15 | | | |
| Email_2_Desc | String | 15 | | | |
| Email_3_Desc | String | 15 | | | |
| Reports_To | Long | 4 | People.<br>Reports_To<br>=<br>Client.Reports_To | Yes | Contact_Number of Contact (Record_Type = 31 or 32) to whom this contact reports (e.g., contact's supervisor or manager).<br>Applies only to Contact records (Record_Type = 31 or 32). |
| Partner_Id | String | 23 | People.<br>(Partner_Id, Partner_Number)<br>= ABPartners.<br>(Partner_Id, Partner_Number) | Yes | Identifies the Address Book entry that is a partner to the individual. |
| Partner_Number | Integer | 2 | | Yes | |
| Lead_Status | Integer | 2 | | Yes | |
| ReadOnly_Id | String | 11 | | | |
| ReadPriv | Integer | 2 | | | |

a. The ODBC driver converts unsigned integers (e.g., 60,000) to signed integers (e.g., -5536). You can convert the signed integers to their unsigned equivalents using the constant 65536. For example, 65536 - 5536 = 60000.

## Appointments Table

The Appointments table includes both personal and company-related appointments.

**Table 10 Appointments Table – Table Rules**

| | |
|---|---|
| **Read Rule** | |
| **Delete Rule** | |
| **Insert Rule** | |

**Table 10 Appointments Table – Table Rules (Continued)**

| | |
|---|---|
| **Update Rule** | Owner_Id only updated by MASTER |

**Table 11 Appointments Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 | Field 3 | Field 4 |
|---|---|---|---|---|---|
| 1 | Unique | Data_Machine_Id | Sequence_ Number | | |
| 2 | Non-Unique | Client_Id | Contact_Number | App_Date | App_Time |
| 3 | Non-Unique | Owner_Id | Alert_Flag | Lead_Date | Lead_Time |
| 4 | Non-Unique | Owner_Id | App_Date | App_Time | |

**Table 12 Appointments Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Data_Machine_Id | Long | 4 | | Yes | |
| Sequence_Number | Long | 4 | | Yes | |
| Owner_Id | String | 11 | | Yes | User, location, or resource the appointment belongs to. |
| App_Date | DateString | 10 | | | Appointment date and time. Mandatory field. |
| App_Time | TimeString | 11 | | | |
| Lead_Date | DateString | 10 | | | Alarm date and time. If left empty, defaults to the App_Date and App_Time. |
| Lead_Time | TimeString | 11 | | | |
| End_Date | DateString | 10 | | | End date and time of Appointment. End_Time cannot be less than the App_Time. If left empty, defaults to the App_Time. |
| End_Time | TimeString | 11 | | | |
| Client_Id | String | 23 | Appointments.(Client_Id, Contact_Number) = Company.(Client_Id, Contact_Number) OR People.(Client_Id, Contact_Number) | | Client the appointment is with. If filled in, then must exist in the Company or People table. Non-modifiable. |
| Contact_Number | Integer | 2 | | | |
| Alert_Flag | Integer | 2 | | | 0 = Alarm not set<br>1 = Alarm set |

**Table 12 Appointments Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Priority | String | 3 | | | Defines the priority text (e.g., Hi, MED, LOW). |
| Completed | Integer | 2 | | | 0 = Incomplete<br>1 = Complete |
| Icon_Type | Integer | 2 | | | 0 = None<br>1 = Mail<br>2 = ToDo<br>3 = Phone<br>4 = Travel<br>5 = Sale<br>6 = Meal<br>7 = Presentation<br>8 = Speech<br>9 = Meeting<br>**Note:** Icons can be viewed when an Appointment is being created. |
| RSVP | Integer | 2 | | Yes | User's response to appointment invitation:<br>0 = No response<br>1 = User accepts appointment<br>2 = Declined<br>3 = Tentative response<br>Non-modifiable. |
| Recurring_ID | Integer | 2 | | Yes | Unique recurring ID:<br>0 = Non-recurring<br>Other unique value = Identifier for records belonging to a recurring appointment |
| Recurring_Freq | Integer | 2 | | | Frequency of recurring appointment:<br>0 = Daily<br>1 = Weekly<br>2 = Day of month (e.g., first Monday)<br>3 = Monthly (e.g., 14th)<br>4 = Yearly |

**Table 12 Appointments Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Occurence | Integer | 2 | | | Identifies relative day of recurring appointment (e.g., second Tuesday). Applies to weekly, day of month, and monthly appointments only.<br>**Weekly appointments:**<br>0 = Every ___<br>1 = Every second ___<br>2 = Every third ___<br>...<br>25 = Every 26th ___<br>**Day of month appointments:**<br>0 = Every 1st ___ of the month<br>1 = Every 2nd ___ of the month<br>...<br>31 = Every Last ___ of the month<br>**Monthly appointments:**<br>0 = First ___ of the month<br>1 = Second ___ of the month<br>2 = Third ___ of the month<br>3 = Fourth ___ of the month<br>4 = Last ___ of the month<br>**Note:** This field is spelled as it appears here (i.e., “Occurence” and not “Occurrence”). |

**Table 12 Appointments Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Day_Of_Week | Integer | 2 | | | Day of recurring appointment (e.g., Friday). Applies to weekly, day of month, and monthly appointments only.<br>**Weekly and Monthly appointments:**<br>0 = Sunday<br>1 = Monday<br>2 = Tuesday<br>3 = Wednesday<br>4 = Thursday<br>5 = Friday<br>6 = Saturday<br>**Day of month appointments:**<br>0 = Day<br>1 = Weekday |
| Skip_Weekend | Integer | 2 | | | Applies to daily appointments only.<br>0 = Default<br>1 = Daily appointments do not occur on weekends. |
| Move_To_ Weekday | Integer | 2 | | | Applies to yearly appointments only.<br>0 = Default<br>1 = If appointment occurs on a weekend, move to nearest weekday. |
| Start_Date | DateString | 10 | | | Appointment start date. |
| End_Date | DateString | 10 | | | Appointment end date. |
| Peg_Board_State | Integer | 2 | | | Peg Board state when an appointment occurs:<br>0 = Unknown<br>1 = Busy<br>2 = Out (Default) |
| Text | String | 119 | | | Text of Appointment.<br>Mandatory field. |
| Creator_Id | String | 11 | | Yes | |
| Creation_Date | DateString | 10 | | Yes | |
| Creation_Time | TimeString | 11 | | | |

**Table 12 Appointments Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Private | Integer | 2 | | | |

# Hotlist Table

The Hotlist table includes both personal and company related tasks.

**Note**
The Hotlist table does not have any special table-level rules.

**Table 13 Hotlist Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 | Field 3 | Field 4 | Field 5 | Field 6 | Field 7 |
|---|---|---|---|---|---|---|---|---|
| 1 | Unique | Data_ Machine _Id | Sequence _Number | | | | | |
| 2 | Non-Unique | Owner_ Id | Client_Id | Contact_ Number | Entry_ Type | Type_Id | Original_ Date | Original_ Time |
| 3 | Non-Unique | Owner_ Id | Complete d | Schedule _Date | Schedule _Time | | | |
| 4 | Non-Unique | Client_Id | Contact_ Number | Schedule _Date | Schedule _Time | | | |
| 5 | Unique | Opp_Id | Opp_ Number | Step_Id | Activity_ Id | | | |
| 6 | Non-Unique | Owner_ Id | Schedule_ Date | Schedule _Time | | | | |
| 7 | Non-Unique | Owner_ Id | Alarm | Lead_ Date | Lead_ Time | | | |

**Table 14 Hotlist Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Data_Machine_Id | Long | 4 | | Yes | |
| Sequence_Number | Long | 4 | | Yes | |

**Table 14 Hotlist Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Owner_Id | String | 11 | | Yes | User or group who owns the record. If originated from OppActivity, it is the Owner_Id of the Team Member responsible for the opportunity. Defaults to the current Login ID. |
| Schedule_Date | DateString | 10 | | | Date and time when task was scheduled. Mandatory field. |
| Schedule_Time | TimeString | 11 | | | |
| Client_Id | String | 23 | Hotlist.(Client_Id, Contact_Number) = Company.(Client_Id, Contact_Number) OR People.(Client_Id, Contact_Number) | | Client ID with which the task is associated. Leave empty for a personal appointment. Otherwise it must already exist in the Company or People table. Non-modifiable. |
| Contact_Number | Integer | 2 | | | Contact number with which the task is associated. Leave empty for a personal appointment. Otherwise it must already exist in the Company or People table. Non-modifiable.<br>Contact_Number = 0 - 59999 |
| Entry_Type | Integer | 2 | | | Source of the task:<br>0 = Manual task<br>3 = Date from a date user field table |
| Original_Date | DateString | 10 | | | Original date and time of task. If left empty, defaults to the system clock. |
| Original_Time | TimeString | 11 | | | |
| Type_Id | Integer | 2 | | | Pointer to date field in the UDF_List table. Non-modifiable. |
| Priority | String | 3 | | | Priority of task. |
| Completed | Integer | 2 | | | 0 = Incomplete<br>1 = Complete |

**Table 14 Hotlist Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Opp_Id | String | 23 | Hotlist.(Opp_Id, Opp_Number, Step_Id, Activity_Id) = OppActivity. (Opp_Id, Opp_Number, Step_Id, Activity_Id) | | Identifier of the associated opportunity related to the OppActivity from which the task originated. Must already exist in the OppActivity table. |
| Opp_Number | Integer | 2 | | | |
| Step_Id | Long | 4 | | | Identifier of the OppActivity from which the task originated. Must already exist in the OppActivity table. For Follow-up activities, may not exist in the OppActivity table. |
| Activity_Id | Long | 4 | | | Identifier of the OppActivity from which the task originated. Must already exist in the OppActivity table. |
| Alarm | Integer | 2 | | | 0 = No alarm<br>1 = Alarm |
| Icon_Type | Integer | 2 | | | Icon associated with the Hotlist task:<br>0 = None<br>1 = Mail<br>2 = ToDo<br>3 = Phone<br>4 = Travel<br>5 = Sale<br>6 = Meal<br>7 = Presentation<br>8 = Speech<br>9 = Meeting<br>**Note:** Icons can be viewed when a Hotlist task is created. |
| Lead_Date | DateString | 10 | | | Date and time when alarm will occur. If left empty, defaults to Schedule_Date and Schedule_Time. |
| Lead_Time | TimeString | 11 | | | |
| End_Time | TimeString | 11 | | | Task end time. Greater than or equal to Schedule_Time. If left empty, defaults to system clock's time. |
| Text | String | 119 | | | Text of the Hotlist item. Mandatory field. |

**Table 14 Hotlist Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Creator_Id | String | 11 | | Yes | |
| Creation_Date | DateString | 10 | | Yes | |
| Creation_Time | TimeString | 11 | | | |

# Notes Table

The Notes table includes history and Notes that are created for Companies/Individuals and Contacts.

**Note**
The Notes table does not have any special table-level rules.

**Table 15 Notes Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 | Field 3 | Field 4 | Field 5 |
|---|---|---|---|---|---|---|
| 1 | Unique | Data_ Machine_Id | Sequence_ Number | | | |
| 2 | Non-Unique | Date | Time | | | |
| 3 | Non-Unique | Type | Date | Time | | |
| 4 | Non-Unique | Client_Id | Contact_ Number | Date | Time | |
| 5 | Non-Unique | Client_Id | Contact_ Number | Type | Date | Time |

**Table 16 Notes Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Data_Machine_Id | Long | 4 | | Yes | |
| Sequence_Number | Long | 4 | | Yes | |
| Creator_Id | String | 11 | | Yes | |

**Table 16 Notes Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Client_Id | String | 23 | Notes.(Client_Id, Contact_Number) = Company.(Client_Id, Contact_Number) OR People.(Client_Id, Contact_Number) OR Opportunity.(Opp_Id,Opp_Number) | | Client_Id/Contact_Number the Note is associated with. Valid values for Contact_Number: 0 - 59999. Associated Company or Person record must already exist. Mandatory field. Non-modifiable. Must provide Client_Id/Contact_Number to insert. Cannot update. |
| Contact_Number | Integer | 2 | | | |
| Type[a] | Integer | 2 | | | Flag indicating how the note was generated.<br>Standard Maximizer note types may be specified as well as user-defined note types.<br>Range: 0 - 32,767<br>0 = Manual note<br>1 = Mail-out note<br>2 = Phone call note<br>3 = Timed note<br>4 = Transfer note<br>5 = Completed task or appointment<br>6 = Scheduled task or appointment<br>7 = Email sent note<br>8 = Opportunity created or opportunity status changes<br>9 = History note<br>10 = Reassign task note<br>11 = Reserved for future use<br>Can insert. Can update. |
| Date | DateString | 10 | | Yes | |
| Time | TimeString | 11 | | | |
| Text | Memo | n/a | | | Mandatory field. Must be less than or equal to 9,215 characters. Must provide Text to insert. Can insert Can update. |
| Private | Integer | 2 | | | |

**Table 16 Notes Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Owner_Id | String | 11 | | Yes | |
| Note_Type | String | 19 | | | Within Maximizer, this string is used only for display purposes to indicate a sub-type of note. If a standard type is defined in the Type field, this string is appended to the standard type name for display. In Maximizer, this field appears as Category on the Note dialog box for manual notes only. Can insert. Can update. |
| Entity_Type | Integer | 2 | | | Type of parent record the note belongs to. Entity_Type values correspond to the Client_Id/ Contact_Number. Cannot update. See the footnote.[b]<br>0 = Not specified<br>1 = Address Book entry<br>2 = Opportunity<br>4 = User<br>7 = Order<br>8 = Order Item<br>9 = Default Entry |
| ReadOnly_Id | String | 11 | | | |
| ReadPriv | Integer | 2 | | | |

a. Some Maximizer functions, such as purging, and searching, do not support user-defined note types, which have a Type value greater than 17.

b. If the Client_Id/Client_Number matches more than one parent type, the Entity_Type will be inserted according to the following priority: 1-Address Book entry, 2-Opportunity, 4-Custom

## Opportunity Table

The data in the Opportunity table contains all the attributes pertaining to the Opportunity entity in the Opportunity Management System. The attributes can be type of identification, foreign links, status, or statistic. For the foreign links, see the Opportunity Management Table Relations diagram at the beginning of this chapter. The statistic types are maintained by the system and should be left untouched. You can modify them, but do so only if you have an in-depth knowledge of the system.

**Table 17 Opportunity Table – Table Rules**

| | |
|---|---|
| **Read Rule** | |
| **Delete Rule** | Can only delete if Owner_Id is equal to Login_Id.<br>OppActivity, OppStep, OppSuccessFactor, OppRole, Combined_Opp_User_Fields, and OppComp with the same Opp_Id will be deleted. |
| **Insert Rule** | |
| **Update Rule** | Cannot update if any OppRole, OppActivity, OppComp, OppContact, OppSuccessFactor, or OppStep exists with the same Opp_Id. |

**Table 18 Opportunity Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 |
|---|---|---|---|
| 1 | Unique | Data_Machine_Id | Sequence_Number |
| 2 | Unique | Opp_Id | Opp_Number |
| 3 | Non-Unique | Client_Id | Contact_Id |
| 4 | Non-Unique | Strategy_Id | |

**Table 19 Opportunity Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Data_Machine_Id | Long | 4 | | Yes | |
| Sequence_Number | Long | 4 | | Yes | |
| Client_Id | String | 23 | Opportunity.(Client_Id, Contact_Number) = Company.(Client_Id, Contact_Number) OR People.(Client_Id, Contact_Number) | | Company/Individual that is associated with the Opportunity. Mandatory field. Associated Company must already exist in the Company table. Non-modifiable. |
| Contact_Number | Integer | 2 | | Yes | Not used. Reserved for future use. Always 0. |

**Table 19 Opportunity Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Opp_Id | String | 23 | | Yes | System-generated unique identifier. |
| Opp_Number | Integer | 2 | | Yes | Unique identifier. Opp_Number is always 0. |
| Comp_Client_Id | String | 23 | | | Competitor that the Opportunity was lost to. |
| Comp_Contact_ Number | Integer | 2 | | | |
| Owner_Id | String | 11 | | | |
| Strategy_Id | Long | 4 | | | |
| Team_Id | Integer | 2 | | | |
| Status | Integer | 2 | | | Status of the Opportunity:<br>0 = New<br>1 = In Progress<br>2 = In Progress New<br>3 = Won<br>4 = Lost<br>5 = Abandoned<br>6 = Suspended |
| Name | String | 79 | | | Company/Individual associated with the Opportunity. Defaults to Client ID. |
| Objective | String | 253 | | | Sales Objective of the Opportunity. |
| Reason_Id | Long | 4 | Opportunity.(Reason_Id) = Reasons.(Reason_Id) | | ID of the Reason why the Opportunity was completed. Modified by OppLeader only. |
| Probability_ Closing | Integer | 2 | | | Percentage probability of closing the Opportunity. Based on an internal calculation formula. Valid values: 0 - 100. Modifiable by OppLeader only. (Updated automatically by selecting "Refresh Opportunity" in OMS.) |
| Actual_Revenue | Double | 8 | | | Actual revenue generated by the Opportunity. Applicable only if Status = 3. |

**Table 19 Opportunity Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Cost | Double | 8 | | | Running total of the costs associated with Activities for the Opportunity. Must be greater than 0. |
| Forecast_Revenue | Double | 8 | | | Revenue expected from successfully completing an Opportunity. Must be greater than 0. Modifiable by OppLeader only. |
| Start_Date | DateString | 10 | | | Date when the Opportunity was started. If left empty, defaults to the system clock. If 1, the date can be updated by the OppLeader only. |
| Estimated_Close_Date | DateString | 10 | | | Original close date for the Opportunity. Based on adding the length of time for the Strategy to the Start_Date. Must be greater than Start Date. Modifiable by OppLeader only. If specified, becomes the Close_Date by default. |
| Close_Date | DateString | 10 | | | Projected or actual close date for the Opportunity. Updated as the Opportunity's steps are applied before or ahead of schedule. Must be greater than Start Date. Modifiable by OppLeader only. |
| Last_Modify_Date | DateString | 10 | | | Reserved for future use. |
| Comment | Memo | n/a | | | General comment for the Opportunity. Modifiable by OppLeader only. |
| Completion_Comment | Memo | n/a | | | Completion comment for the Opportunity. |
| Creator_Id | String | 11 | | Yes | |
| Creation_Date | DateString | 10 | | Yes | |
| Creation_Time | TimeString | 11 | | | |

**Table 19 Opportunity Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Suspended_Date | DateString | 10 | | | The date an opportunity became suspended. This field is set by Maximizer when an opportunity with a strategy is applied. |
| Days_Suspended | Long | 4 | | | The number of days an opportunity was suspended. This field is set by Maximizer only when an applied opportunity which was suspended is resumed after one day or more. |
| NextAction | String | | | | Next action in the Action Plan for this Opportunity, as defined by the user.<br>Applicable only when Opp_Type = 0. |

# User_Details Table

The User_Details table contains personal information for users such as name, phone numbers, and email address.

**Table 20 User_Details Table – Table Rules**

| | |
|---|---|
| **Read Rule** | Read-only |
| **Delete Rule** | Read-only |
| **Insert Rule** | Read-only |
| **Update Rule** | Read-only |

**Table 21 User_Details Table – Index Definitions**

| Index # | Index Type | Field 1 | Field 2 |
|---|---|---|---|
| 1 | Unique | Rec_Type | User_Id |

**Table 22 User_Details Table – Fields**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Rec_Type | Integer | 2 | | Yes | Value is always 6. |
| User_Id | String | 11 | | Yes | |
| Mr/Ms | String | 79 | | Yes | |
| First_Name | String | 79 | | Yes | |
| Initial | String | 79 | | Yes | |
| Last_Name | String | 79 | | Yes | |
| Title | String | 79 | | Yes | |
| Salutation | String | 79 | | Yes | |
| Company_Name | String | 79 | | Yes | |
| Department | String | 79 | | Yes | |
| Division | String | 79 | | Yes | |
| Address_Line1 | String | 79 | | Yes | |
| Address_Line2 | String | 79 | | Yes | |
| City | String | 79 | | Yes | |
| State_Province | String | 79 | | Yes | |
| Zip_Code | String | 79 | | Yes | |

**Table 22 User_Details Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Country | String | 79 | | Yes | |
| Phone_1 | String | 21 | | Yes | |
| Phone_1_ Extension | String | 21 | | Yes | |
| Phone_2 | String | 21 | | Yes | |
| Phone_2_ Extension | String | 21 | | Yes | |
| Phone_3 | String | 21 | | Yes | |
| Phone_3_ Extension | String | 21 | | Yes | |
| Phone_4 | String | 21 | | Yes | |
| Phone_4_ Extension | String | 21 | | Yes | |
| Email_Address | String | 119 | | Yes | |
| Web_Site | String | 119 | | Yes | |
| Custom_Field_1 | String | 119 | | Yes | |
| Custom_Field_2 | String | 119 | | Yes | |
| Custom_Field_3 | String | 119 | | Yes | |
| Custom_Field_4 | String | 119 | | Yes | |
| Creator_Id | String | 11 | | Yes | |
| Creation_Date | DateString | 10 | | Yes | |
| Creation_Time | TimeString | 11 | | | |
| Last_Update_Date | String | 10 | | Yes | |
| Last_Update_Time | String | 11 | | Yes | |
| Private_Read | Integer | 2 | | Yes | 0 = Public<br>1 = Private |
| CS_Manager | Integer | 2 | | Yes | 0 = False<br>1 = True |
| CS_Representative | Integer | 2 | | Yes | 0 = False<br>1 = True |
| KB_Approver | Integer | 2 | | Yes | 0 = False<br>1 = True |

**Table 22 User_Details Table – Fields (Continued)**

| Field Name | Data Type | Len | Foreign Table Reference | Read-Only | Description and Rules |
|---|---|---|---|---|---|
| Sales_Manager | Integer | 2 | | Yes | 0 = False<br>1 = True |
| Sales_<br>Representative | Integer | 2 | | Yes | 0 = False<br>1 = True |

Appendix C

# Glossary of Terms

# Glossary of Terms

Use this list of terms to help familiarize yourself with the terminology of Maximizer.

**Access Rights** – security settings for users. Access rights control each user's permissions to read, insert, modify, or delete various types of Maximizer entries. They also control general Maximizer privileges, user roles, and allowed printing destinations. Access rights determined by the user's access settings and the access settings of any security groups the user belongs to.

**Access Settings** – there are two types of access settings: user access settings and group access settings. Combined user and group access settings determine a user's access rights.

**Accounting Link** – a Maximizer add-on that enables users to connect to a QuickBooks company file through Maximizer. For more information, refer to the *Accounting Link User's Guide* or the Maximizer website.

**Address Book** – a Maximizer database.

**Address Book entry** – a Company, Individual, or Contact in the Maximizer Address Book.

**Administrator** – a Maximizer module in which the Address Book administrator can perform system configuration and maintenance for the Maximizer system and Address Books.

**Advanced Import** – importing an MXI or XML file into an Address Book.

**Calendar** – a Maximizer window in which you can manage your appointments.

**Company** – an Address Book entry used to record information for a company or organization.

**Company Library** – a shared library of company literature.

**Contact** – an Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

**Controlling window** – a main Maximizer window, such as the Address Book window, that determines what tabbed following windows are displayed. The contents of the following window depend on which entry is selected in the main controlling window.

**Crystal Reports** – a tool for creating and viewing reports, available through the Reports menu in Maximizer.

**default entry** – an entry (such as an Address Book entry) containing default field values that are propagated to new entries by default.

**ecBuilder** – a tool to automate web-based sales.

**Escona** – the Escona Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer's possibilities.

**Following window** – a tabbed sub-window of a controlling window. The contents of the following window depend on which entry is selected in the main controlling window. For example, the Contacts window displays only those Contacts that belong to the selected entry in the Address Book window.

**Global Edit** – a Maximizer operation that enables you to apply the same change to multiple Maximizer entries simultaneously.

**Holiday Editor** – a tool in Administrator for adding holidays to the Maximizer Calendar window.

**Hotlist** – a window in Maximizer used to display tasks and appointments in a specific date range.

**HTML** – HyperText Markup Language. A document format used for displaying web pages in a browser.

**intranet** – an internal network—much like the Internet—that is self-contained with the local area network (LAN). Frequently, a web server is used to display pages that should be accessible only within the company.

**IP address** – a number used to uniquely identify a specific computer on a network. Every network-connected computer has an IP address.

**list** – a listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

**ListsNOW.com** – an Internet list-brokering service that provides you with access to over 200 million households in the US and UK. The lists can be downloaded to your computer and then imported directly into Maximizer as Address Book entries. You can then use the data for your sales prospecting activities.

**log in** – the act of entering your user ID and password to gain access to a Maximizer Address Book. The Login dialog box prompts you for your user ID and password.

**Master user** – the Address Book administrator's user ID. This user ID permits access to Administrator.

**Maximizer Link for the Palm OS** – Maximizer and Maximizer Link for the Palm OS form a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of the Palm OS device. Maximizer Link information and help is available to those with Maximizer Link installed.

**merge field** – text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact’s name, so you can customize a letter’s salutation with the recipient’s name.

**note** – a text document attached to Address Book entries, Contacts, and opportunities.

**OLE** – object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

**online** – information that is “online” is sometimes used to describe information on the Internet or on your computer screen. An “online” user guide or “online” Help is documentation displayed on your screen.

**opportunity** – an entry in Maximizer used to record an opportunity to make a sale.

**OrderDesk** – a window in Maximizer used to manage orders and inquiries from your online catalog.

**Outlook Synchronization** – a Maximizer feature for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and Microsoft Outlook.

**order screens** – some of the screens displayed to a customer when he/she orders a catalog item. Order screens can be customized by editing the order screen templates.

**preferences** – a collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator; some are set in the modules.

**prospect** – a potential customer. ListsNOW.com lets you acquire and import lists of prospects. You can then use the data for your sales prospecting activities.

**related entries** – an entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

**search engine** – a website on the Internet that keeps a searchable index of websites. You can register your website with a search engine so customers can find your site by performing a search. Examples of search engines are Google and Yahoo!.

**security group** – a set of access settings for a subset of Maximizer users.

**SMTP** – an SMTP server is a server used for outgoing Internet email.

**template** – a file that outlines the design for a document, email, or web page. Maximizer uses templates for word processor documents.

**Training Guide** – the *Maximizer Training Guide* and CD introduces Maximizer using exercises and examples.

**UNC** – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is "\\Escona\MxServer\".

**user-defined field** – a custom field used to record additional "user-defined" information for Address Book entries, opportunities, and users.

**user ID** – a name that uniquely identifies a Maximizer user. Users must enter their user ID and password in order to gain access to a Maximizer Address Book.

**wizard** – a series of interactive screens that walk you through the steps necessary to perform an action or procedure in a program.

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